

Workforce Services Balanced Scorecard

Report Specifications

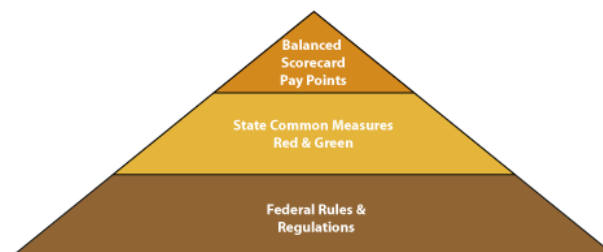
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I. PURPOSE

The purpose of the 2014-2015 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 includes a comprehensive Job Placement performance measure that is also used as a payment 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 performance 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 three sections; Job Placements, Balanced Scorecard Performance Measures, and 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 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
Workforce Management System (WFMS)	Service Account Management System	All Programs

II. REPORT DETAILS

Data shall be obtained from the OSST, WFMS 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. 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 reportable 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. Staff must verify that the jobseeker has started working prior to taking credit for an obtained employment. Notification of a hire date will not suffice for securing OE credit.

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

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

SFWIB refers to a WP Placement as a Wagner-Peyser (WP) Direct Job Placement (DJP). A WP Placement as defined by the Federal regulations at 20 CFR 651.10. is the hiring by a public or private employer of an 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 an individual or individual(s);
- iii. Referred an individual who has not been specifically designated by the employer, except for referrals on agricultural job orders for a specific crew leader or worker;

- iv. Verified from a reliable source, preferably the employer, that the individual had entered on a job; and
- v. Appropriately recorded the placement in EFM.

A WP DJP includes a WP Job Development Placement. The Code of Federal Regulations at 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 EFM. Job development attempts (contacts) should be documented on the job seeker's case notes screen 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 EFM. EFM 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

- i. ***Conditions of Job Placements (DJP or OE)***
 - A. A Job Placement shall count for performance and payment only if the result is recorded in EFM WP during the reporting period of July 1, 2014 – June 30, 2015.
 - B. A Job Placement shall count for performance and payment to the month that the Job Placement was recorded in EFM WP.
 - C. A Job Placement shall count only once per EFM WP Participation Application ID for the same jobseeker within the period of July 1, 2014 – June 30, 2015.
 - D. A duplicate DJP shall count for performance and payment for the initial (first referral) referring center/location in EFM WP.
 - E. A Job Placement shall be verified and recorded in EFM WP before the soft exit date to be eligible for performance and payment.

- F. 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 WIA Adult/DW for performance and payment.
- G. A Job Placement as a result of Self-Employment shall only count as an OE and not a DJP for performance and payment.
- H. Placements to Volunteer Jobs shall not count towards a Job Placement (DJP or OE) for performance and payment.
- I. (OE) If the registration office is different than the office that provided a reportable service within 90 days before the hire and this 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.

ii. *Types of DJP*

A. *Universal Population*

Methodology

A Universal Population DJP refers to a WP jobseeker in EFM that secures a job placement by meeting the federal definition for a “Direct Job Placement” and does not meet the criteria for any of the other five types of DJP. The WP DJP must be recorded in EFM during the reporting period.

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

B. *RA Claimant*

Methodology

A Reemployment Assistance (RA) DJP refers to a WP jobseeker receiving RA benefits (RA claimant) without a job placement since the WP enrollment date in EFM and secures a DJP within 90 days from WP enrollment date and does not meet the criteria for any of the other five types of DJP.

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

C. *Veterans*

Methodology

A Veteran DJP refers to an eligible Veteran in EFM WP that secures a DJP.

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

D. TANF / Career Advancement Program (CAP)

Methodology

A TANF/Career Advancement Program (CAP) DJP refers to a CAP participant in EFM that secures a DJP and the Employment information is also recorded in OSST during the CAP participation period before the program's closure and during the reporting period.

Data Source: The data will be obtained from EFM WP and OSST CAP.

E. WIA Adult/DW

Methodology

A WIA Adult or DW DJP refers to an eligible WIA Adult or DW Participant in EFM that secures a DJP with the WP referral create date being on or after the WIA eligibility/enrollment date and with the hire date not on the same date of the referral create date and/or the WIA eligibility/enrollment date. The WP DJP result date must be recorded in EFM WIA during the WIA participation period before the program's exit.

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

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

F. WIA Adult/DW Training Related

Methodology

A WIA Adult or DW Training Related DJP refers to an eligible WIA Adult or DW participant who completed training and secures a DJP in a training related occupation within 180 days of training completion during the WIA participation period before the program's exit date. The DJP shall have the WP referral create date on or after the WIA eligibility/enrollment date and with the hire date not on the same date of the referral create date and/or the WIA eligibility/enrollment date. The WIA employment information shall also be recorded in EFM WIA during the WIA Adult or DW program participation period and the reporting period.

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

Data Source: The data will be obtained from EFM WP, EFM WIA, and WFMS.

B. BALANCED SCORECARD PERFORMANCE MEASURES

1) **Level of Services Indicator for Special Populations**

Methodology

The measure consists of WIA and WP special populations served and must equate **89 percent of the level of services** per center. The allocated percent is calculated based on the center's percentage of the total (administrative, programmatic, WFMS, and State staffing allocations) funding allocation excluding SNAP and CAP funding divided by the Region's total funding. The **89 percent of the Level of Services** is calculated using the Center's funding percentage times 89 percent.

The total # of WIA and WP special populations served by center

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 EF systems.

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

2) **Training Completion Rate**

Methodology

The measure consists of those WIA, TAA, and CAP participants who completed training in WFMS divided by the number of participants who enrolled in training in WFMS, 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 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.

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.

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 EFM, OSST, and WFMS.

4) *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 and 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 EFM and WFMS systems. The O*Net codes are used to map the training occupations with the placement occupations.

5) *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.

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

6) *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.

The total # of all WP participants placed at exit

Divided by the total # of WP participants who exit

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

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

Methodology

Measures the percent of those WIA Adults and Dislocated Workers participants unemployed at registration and placed at exit from 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 EFM WIA.

8) ***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.

9) ***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.

10) ***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.

The total # of Veteran exiters who were identified as 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 EFM.

11) *Supplemental Nutrition Assistance Program (SNAP) Entered Employment Rate*

Methodology

The measure consists of the number of all SNAP participants with 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 after being 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 with 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 after being 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.

12) *Training Enrollments*

Methodology

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

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

13) *Job Placements (DJP and OE)*

Methodology

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

Data Source: The data will be obtained from EFM.

14) *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 EFM during the reporting period.

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

15) *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) at least one of the following levels of service and recorded in EFM:

Level 1 (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 EFM WP.

16) *Employers Served with Level I Services (Rate)*

Methodology

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

Total number of new Employers with a Level I Service recorded in EFM for the first time during the PY

Divided by the total number of new Employers served for the first time during the program year

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

17) *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 EFM.

18) *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 EFM.

19) *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 EFM.

C. QUALITY ASSURANCE KEY INDICATORS

1) **Outreach to Jobseekers**

Methodology

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

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

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

3) **Work Registration – EFM Complete Registrations**

Methodology

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

4) **Quality of Jobseeker Referrals to Jobs**

Methodology

This measure consists of the number of jobseekers 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.

5) **Follow-up with Jobseeker Referrals to Jobs**

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.

6) **Manage Exits / Follow-up**

Methodology

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

8) **Average Duration of Jobseekers Unemployed**

Methodology

This measure consists of the average length of time unemployed for all the WP Jobseekers since the WP enrollment date with no job placement on its current EFM 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 over 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 over last program year’s total number of new employers served.

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