PRESENTERS

Lynn Bajorek

Daniel Harper

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AGENDA

01 Welcome and Introduction

02 Performance Management Overview

03 Strategic Service Design and Delivery

04 Questions and Wrap Up

TODAY'S OBJECTIVES

Understanding how to apply performance management principles in:

- Local strategic planning

- Continuously improving area and career center operations

- Creating logic models for team and staff processes

PRINCIPLES OF PERFORMANCE

What is a Guiding Principle?

- These principles represent a philosophy used throughout the performance management process, from strategic planning to daily operations.

What is the Goal?

- To enable the measurement of success and increase the adoption of the strategic plan, ensuring that it is implemented at all levels as originally intended.

1. Standardization and Consistency
   - Enables cross-training
   - Allows for comparisons

2. Simplicity
   - Creates understanding
   - Facilitates communication

3. Transparency
   - Provides insight to successes and challenges
   - Promotes the public trust

4. Accountability
   - Explains responsibility
   - Drives improvement
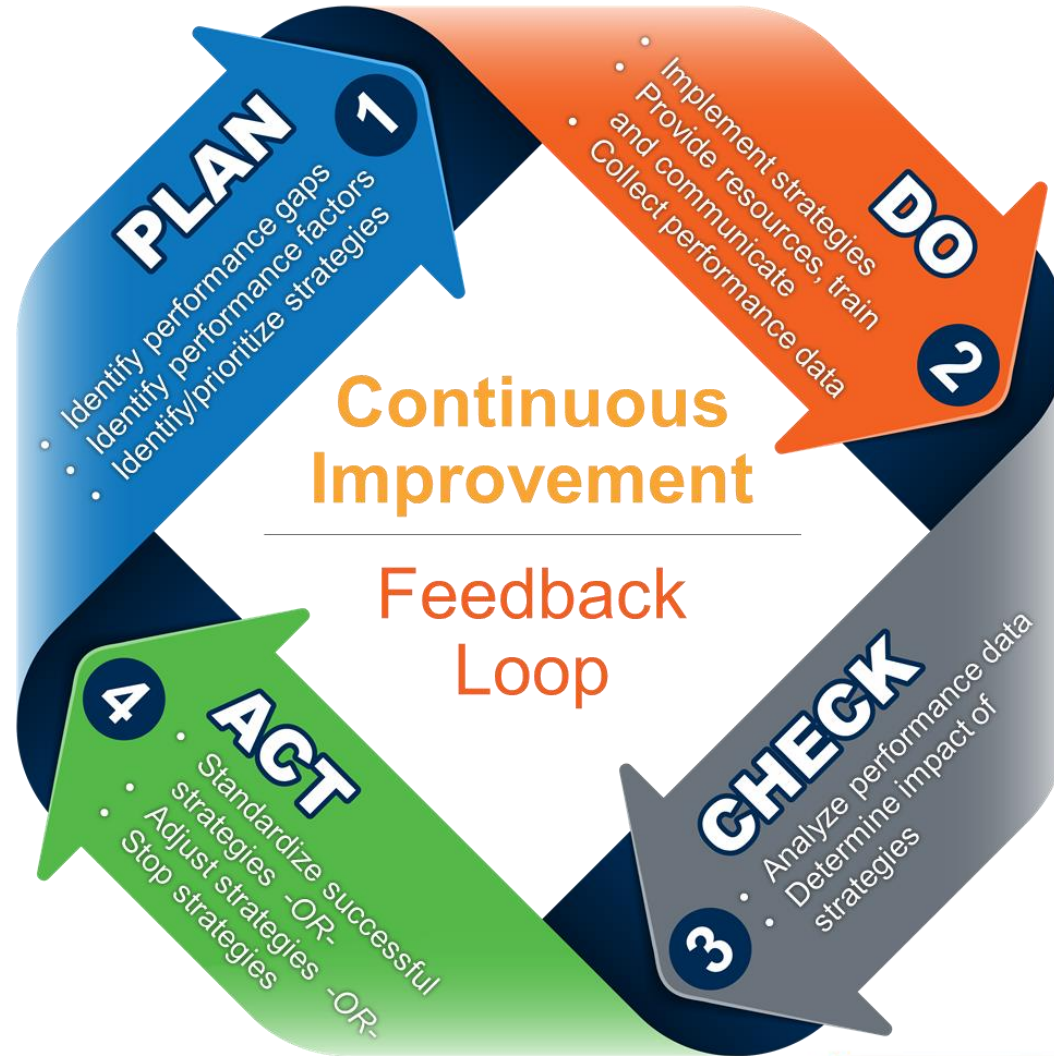
CONTINUOUS IMPROVEMENT

What is Continuous Improvement?

- The scientific approach using a feedback loop to methodically test improvements and identify the most effective strategies.

What is the Goal?

- To increase success by implementing and maintaining a culture of improvement within a system.

PLAN
1
- Identify performance gaps
- Identify performance factors
- Identify/prioritize strategies

DO
2
- Implement strategies
- Provide resources, train and communicate
- Collect performance data

CHECK
3
- Analyze performance data
- Determine impact of strategies

ACT
4
- Standardize successful strategies -OR-
- Adjust strategies -OR-
- Stop strategies

Continuous Improvement

Feedback Loop

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CONTINUOUS IMPROVEMENT

What is Continuous Improvement?

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What is the Goal?

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PLAN

- Break down improvement activities
- Identify:
  - Performance gaps
  - Performance factors
  - Strategies (and prioritize)
- Establish objectives/targets/goals
- Predict outcomes (hypothesis)

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CONTINUOUS IMPROVEMENT

What is Continuous Improvement?

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DO

- Implement strategies

- Provide resources, train and communicate

- Collect performance data in order to test the hypothesis

CONTINUOUS IMPROVEMENT

What is Continuous Improvement?

- The scientific approach using a feedback loop to methodically test improvements and identify the most effective strategies.

What is the Goal?

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CHECK

- Analyze performance data
  - Compare the data to historical trends

- Determine impact of strategies
  - Analyze the gaps against the hypothesis

- Evaluate correlation vs. causation

CONTINUOUS IMPROVEMENT

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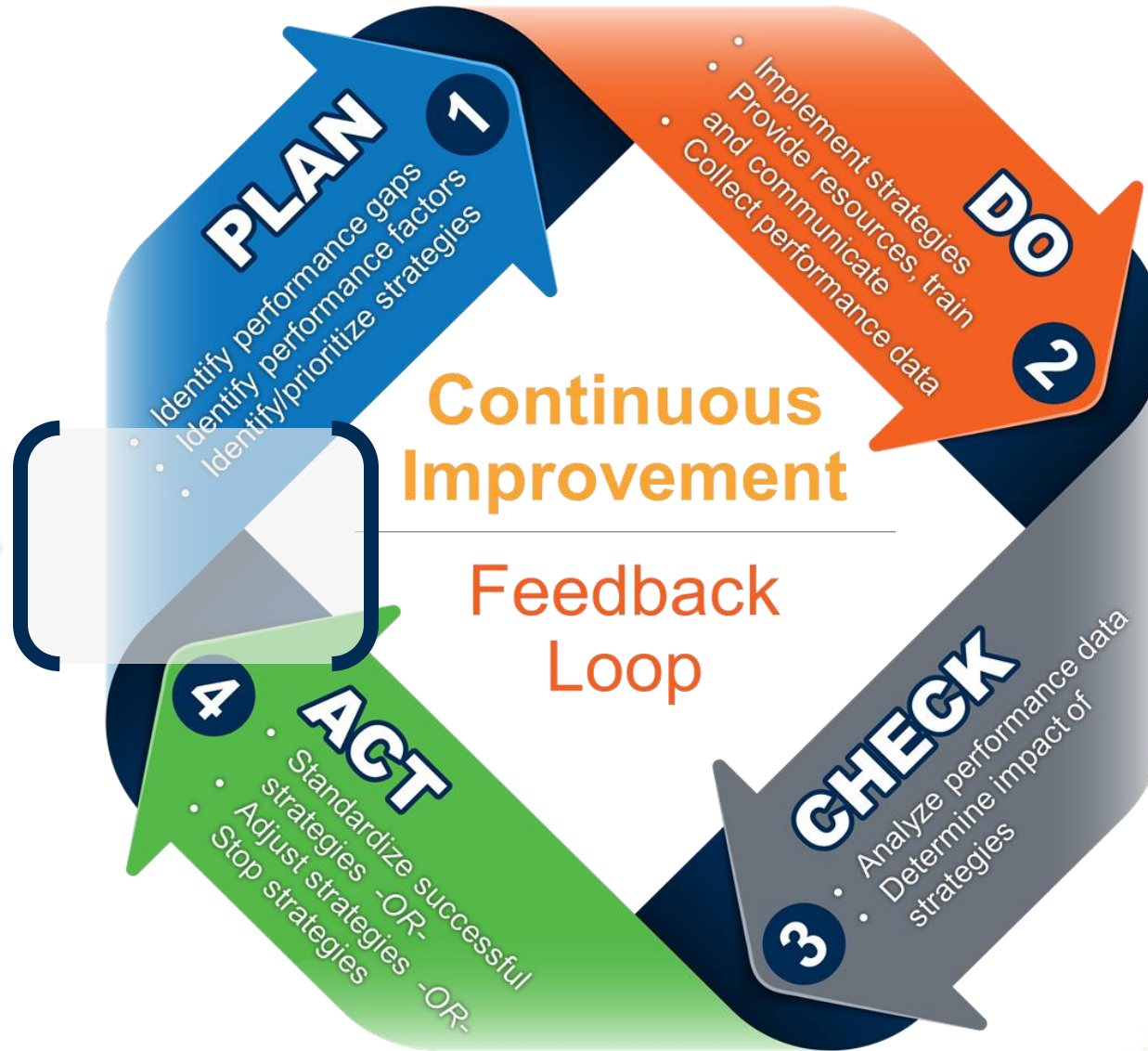
ACT

- If the strategy was found to be successful:
    - Standardize successful strategies
    - Establish the new baseline
    - Institutionalize the new process
    - Make it standard operating procedure, document, etc.
    - Policy/desk aids
    - Expand and share the new process

- If the strategy was found to be unsuccessful:
    - Adjust the strategy *or*
    - Stop the strategy altogether
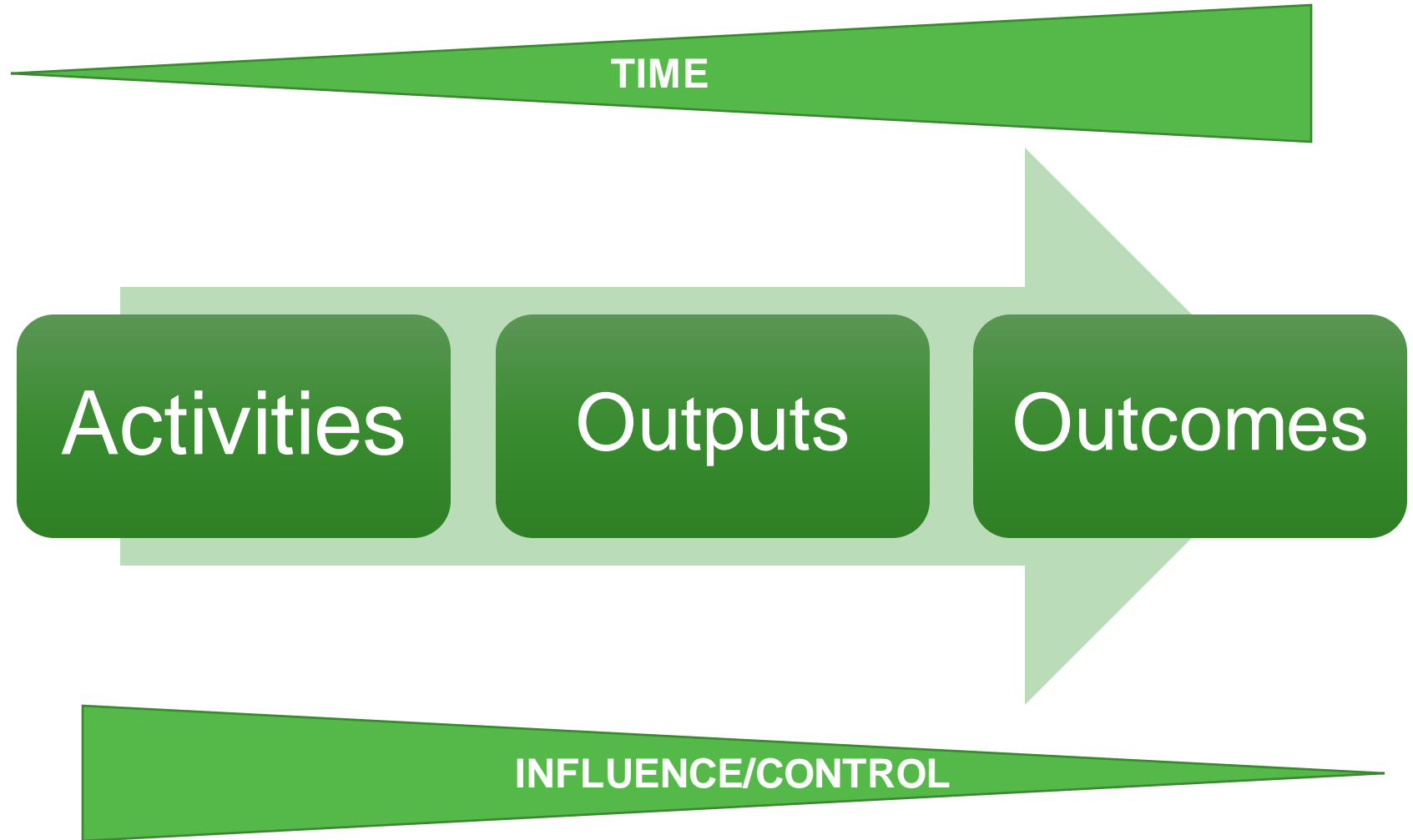
CONTINUOUS IMPROVEMENT

FEEDING FORWARD

Continuous Improvement

Feedback Loop

PLAN 1
- Identify performance gaps
- Identify performance factors
- Identify/prioritize strategies

DO 2
- Implement strategies
- Provide resources, train and communicate
- Collect performance data

CHECK 3
- Analyze performance data
- Determine impact of strategies

ACT 4
- Standardize successful strategies -OR-
- Adjust strategies -OR-
- Stop strategies

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LOGIC MODELS

What is a Logic Model?

- A process that creates a graphical representation of a program's components, order and relationships, as well as the end-product, the model diagram.

What is the Goal?

- To systematically evaluate a program's current effectiveness and create a plan to implement steps for improvement.

TIME

Activities → **Outputs** → **Outcomes**

INFLUENCE/CONTROL

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What is a Logic Model?

- A process that creates a graphical representation of a program's components, order and relationships, as well as the end-product, the model diagram.

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- To systematically evaluate a program's current effectiveness and create a plan to implement steps for improvement.

STEP 1: ACTIVITIES

PROCESS AND METHODS

- What tools are available in the system in order to succeed?

- Workforce Innovation and Opportunity Act Services
  - Basic
  - Individualized
  - Training
  - Follow-up
  - Employer outreach

What is a Logic Model?

- A process that creates a graphical representation of a program's components, order and relationships, as well as the end-product, the model diagram.

What is the Goal?

- To systematically evaluate a program's current effectiveness and create a plan to implement steps for improvement.

STEP 2: OUTPUTS

NUMBER OF ACTIVITIES

- How are they counted?
  - Automated, via the case management system

- When are they captured?
  - Immediately

- How are they summarized?
  - At the most discrete level, by staff and team

- How are they reported?
  - Daily and weekly

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What is a Logic Model?

- A process that creates a graphical representation of a program's components, order and relationships, as well as the end-product, the model diagram.

What is the Goal?

- To systematically evaluate a program's current effectiveness and create a plan to implement steps for improvement.

STEP 3: SHORT-TERM OUTCOMES

IMMEDIATE RESULTS

- How are they counted?
  - Automated and manually (some data requiring staff follow-up)

- When are they captured?
  - Within a month of service delivery

- How are they summarized?
  - At the group level (team/program/center)

- How are they reported?
  - Weekly/monthly

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STEP 4: INTERMEDIATE OUTCOMES

IMPACT ON CUSTOMERS

- How are they counted?
  - Automated and manually (some data requiring staff follow-up)

- When are they captured?
  - Between participation and a year after exit

- How are they summarized?
  - At the area and state level

- How are they reported?
  - Quarterly/Annually

- A process that creates a graphical representation of a program's components, order and relationships, as well as the end-product, the model diagram.

What is the Goal?

- To systematically evaluate a program's current effectiveness and create a plan to implement steps for improvement.

STEP 5: LONG-TERM OUTCOMES

STRATEGIC IMPACT ON THE SYSTEM

- How is it counted?
  - Automated (labor market and economic data)

- When is it captured?
  - A year after each quarter's conclusion

- How is it summarized?
  - At the county, area and state levels

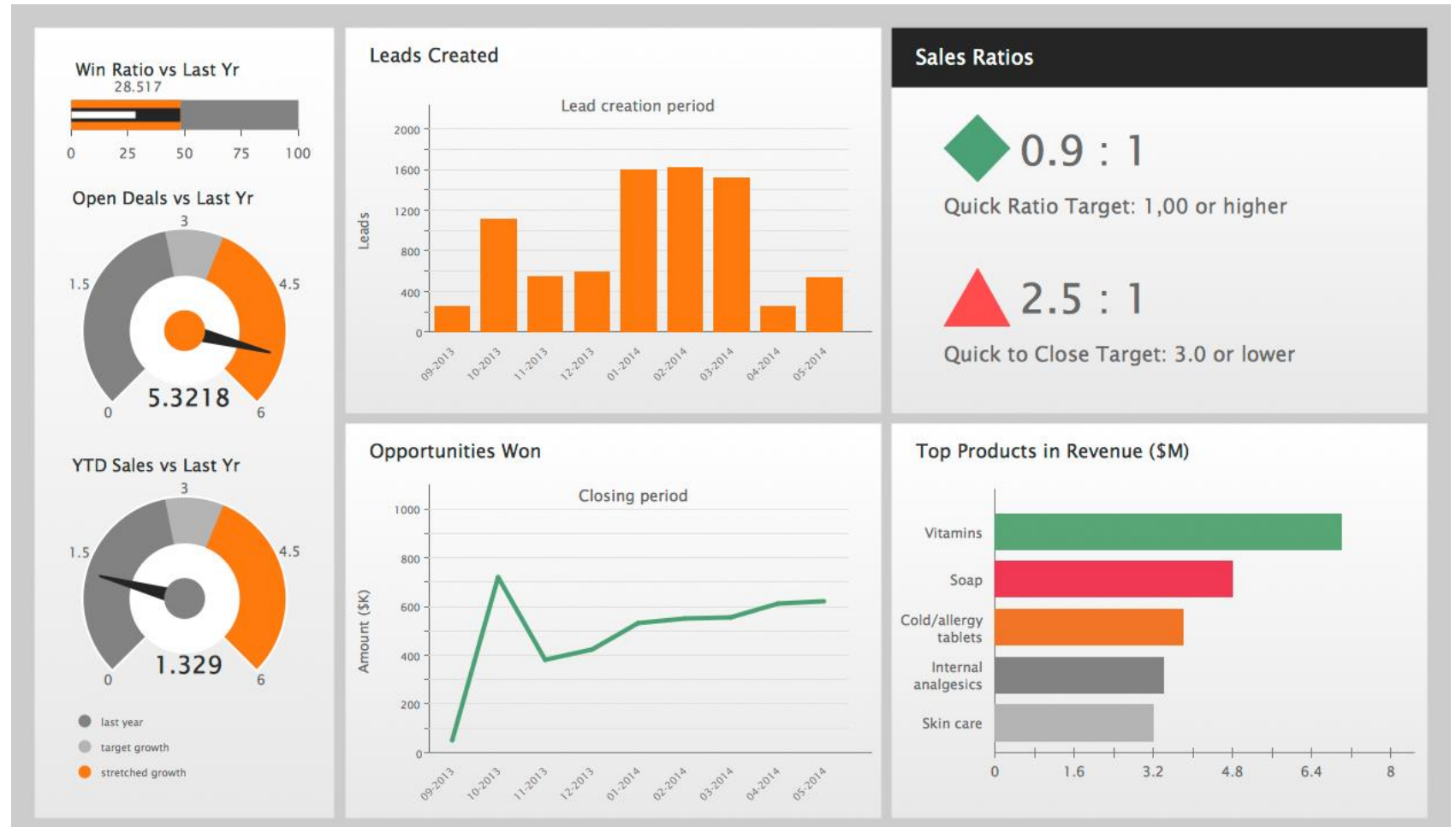- How is it reported?
  - Quarterly and annually

VISUALIZING PERFORMANCE

What is a Dashboard?

- A tool that visualizes a system's short-term and long-term outcomes in a consolidated and comprehensive fashion.

What is the Goal?

- For system partners and stakeholders to determine where the system has been (historical trends), how it's doing currently (latest outcome snapshot) and where it's going (target achievement).
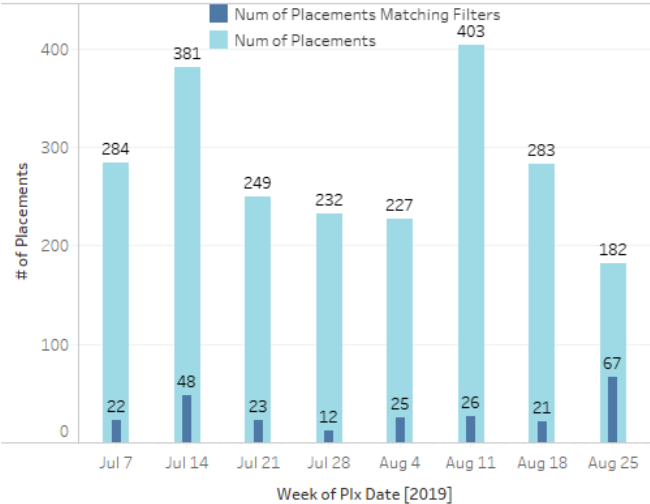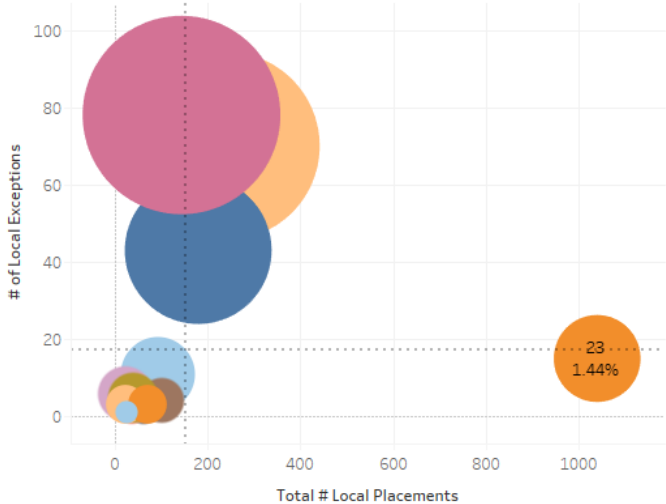
VISUALIZING PERFORMANCE

What is Coming?

- A tool that visualizes a system's short-term and long-term outcomes in a consolidated and comprehensive fashion.

What is the Tool?

- Tableau Server

Exceptions by Office for LWDB All

Filter by...

Never Logged into EF? — No

No Case Notes in EF — No

Placed within week of User Creation — No

Less than 3 Staff Assisted Svc — No

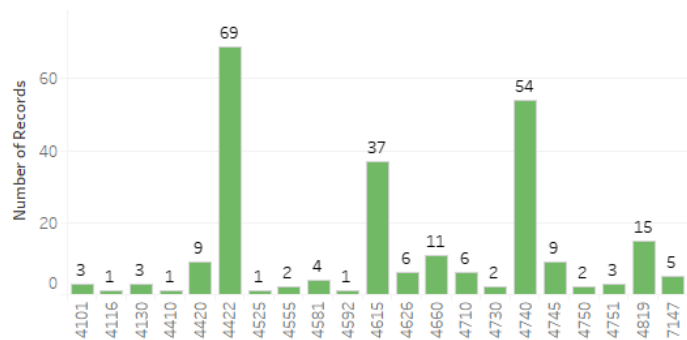Staff Registered Individual? — Yes

Suppressed Referral Job Order? — No

No Background in EF — Yes

Suspicious Phone Number? — No

No Email Address in EF — No

No Work Reg in EF — No

No Resume in EF — No

PRIMARY INDICATORS OF PERFORMANCE PY2018Q4

Measures	PY2018-2019 1st Quarter Performance	PY 2018-2019 % of Performance Goal Met For Q1	PY2018-2019 2nd Quarter Performance	PY 2018-2019 % of Performance Goal Met For Q2	PY2018-2019 3rd Quarter Performance	PY 2018-2019 % of Performance Goal Met For Q3	PY2018-2019 4th Quarter Performance	PY 2018-2019 % of Performance Goal Met For Q4	PY 2018-2019 Performance Goals
Adults:									
Employed 2nd Qtr After Exit	88.70	104.35	89.10	104.82	87.00	102.35	85.70	100.82	**85.00**
Median Wage 2nd Quarter After Exit	$7,800	113.87	$8,088	118.07	$8,319	121.45	$8,272	120.76	**$6,850**
Employed 4th Qtr After Exit	84.50	102.42	85.70	103.88	85.90	104.12	87.00	105.45	**82.50**
Credential Attainment Rate	84.10	135.65	84.80	136.77	85.00	137.10	84.20	135.81	**62.00**
Dislocated Workers:									
Employed 2nd Qtr After Exit	89.10	107.35	88.80	106.99	88.70	106.87	88.70	106.87	**83.00**
Median Wage 2nd Quarter After Exit	$7,968	116.32	$8,016	117.02	$8,102	118.28	$8,199	119.69	**$6,850**
Employed 4th Qtr After Exit	86.80	109.87	86.20	109.11	85.90	108.73	86.70	109.75	**79.00**
Credential Attainment Rate	83.40	122.65	82.40	121.18	82.70	121.62	81.90	120.44	**68.00**
Youth:									
Employed 2nd Qtr After Exit	82.70	110.27	82.30	109.73	83.50	111.33	81.50	108.67	**75.00**
Employed 4th Qtr After Exit	81.00	117.39	79.70	115.51	80.10	116.09	80.10	116.09	**69.00**
Credential Attainment Rate	86.30	114.76	85.00	113.03	81.20	107.98	79.80	106.12	**75.20**
Wagner Peyser:									
Employed 2nd Qtr After Exit	65.80	106.13	64.50	104.03	64.40	103.87	66.00	106.45	**62.00**
Median Wage 2nd Quarter After Exit	$5,294	109.15	$5,307	109.42	$5,362	110.56	$5,335	110.00	**$4,850**
Employed 4th Qtr After Exit	67.00	104.69	64.30	100.47	63.90	99.84	64.10	100.16	**64.00**

Not Met (less than 90% of negotiated)
Met (90-100% of negotiated)
Exceeded (greater than 100% of negotiated)

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LOCAL AREA
PLANNING INSIGHTS

Dislocated Workers

Career Pathways

SERVICE DESIGN SCENARIOS

DISLOCATED WORKER SERVICE STRATEGY

Gap Analysis:

- Dislocated Worker enrollments, exiters and employments are declining
- Dislocated Worker exit rate (% of enrollments exiting) is increasing
- Dislocated Worker obligation and expenditure rates are too low

Potential Solutions:

- Recruitment with partners (colleges, Wagner-Peyser, UI, CBOs, etc.)
- Enrollment retention
  - Analyze existing Dislocated Worker data
  - Survey current and former caseload for feedback
  - Improve follow-up

- Gap Analysis

- Brainstorming

- Strategizing

LOGIC MODEL: DISLOCATED WORKER SERVICE STRATEGY

ACTIVITIES	OUTPUTS	SHORT-TERM OUTCOMES	INTERMEDIATE OUTCOMES	LONG-TERM OUTCOMES
Data pull for potentially eligible Dislocated Worker participants Outreach (phone calls, emails, postcards) Orientations Leveraging UI/RESEA Career Pathways	Increased inquiries Increased program referrals Increased applications	Increased awareness of the program	Increase in enrollments	Talent pipeline development WIOA Performance achieved Prevent monitoring findings Improved partner relationships (referrals and co-enrollment)

CONTINUOUS IMPROVEMENT: DISLOCATED WORKER SERVICE STRATEGY

PLAN → **DO** → **CHECK** → **ACT**

DISLOCATED WORKER SERVICE STRATEGY – PLAN

- Dislocation Worker enrollments are declining faster than other programs

- Prioritized retention over recruitment (more cost-effective)

- Identified low-effort outreach for recruitment

DISLOCATED WORKER SERVICE STRATEGY –DO

- Begin collecting Dislocated Worker "churn" data (enrollments vs. exits)

- Create new case manager reports

- Begin outreach to current case load

- Begin follow up to previous participants

DISLOCATED WORKER SERVICE STRATEGY – CHECK

- Analyze the "churn" to identify exit patterns

- Create and analyze reports on targeted outreach and follow up

DISLOCATED WORKER SERVICE STRATEGY – ACT

- If reports are a value-add, improve and standardize

- Develop new processes for retention

- Eliminate old processes not promoting retention

CAREER PATHWAYS

Gap Analysis:
- Employment in 2Q and 4Q after exits is declining
- Credential attainment is too low to meet demand
- Business customer satisfaction is stagnant

Potential Solutions:
- Sector partnerships develop a career pathways system that includes all of the education, training and support services connected regionally to help people grow in a career and businesses in key industries access a qualified talent pipeline.

Common Characteristics of Effective Career Pathway Systems:
- Mapped pathways based on good data & informed by employers
- Partner planning, policies and operations are aligned to support movement along the pathway
- Include opportunities to accelerate and contextualize learning
- Industry recognized stackable credentials

- Gap Analysis
- Brainstorming
- Strategizing

CAREER PATHWAYS, THE LOGIC MODEL

ACTIVITIES	OUTPUTS	SHORT-TERM OUTCOMES	INTERMEDIATE OUTCOMES	LONG-TERM OUTCOMES
Work w/sector partnership to identify key occupations Develop career pathway "map" Do gap analysis Develop programming/supports and integrate into service delivery	An articulated career pathway "system" is developed for key occupations	Job seekers, workers, teachers, parents, and case managers have a clear understanding of the career pathways, including the skills and education needed to advance from step to step	More people enter into or move along the career pathway with access to more or better programming and supports	Workers advance along the career pathway Businesses have the talent pipeline(s) they need WIOA performance improves Economic prosperity

CAREER PATHWAYS – PLAN

- Businesses in Healthcare Sector Partnership are struggling to fill key positions w/qualified talent

- Job seekers need work quickly to pay their bills and cannot engage in currently available training opportunities

CAREER PATHWAYS – DO

- Work with employers in the healthcare sector partnership to identify the knowledge, skills and abilities required for hard to fill, in-demand occupations

- Map out the pathway and identify "gaps" in education programming

- Work w/education & industry partners to develop programming in an "earn and learn model" to move workers along an accelerated pathway

- Work w/key partners to ensure open access to the pipeline from all populations to meet business' demand for talent and the system's need to achieve outcomes for all

- Establish both process and outcome measures to ensure progress

CAREER PATHWAYS – CHECK

- Analyze process measures to ensure progress toward developing programming and pipeline

- Analyze investments across partners to ensure focus on career pathway

- Analyze credential attainment, median earnings and employment after exit measures to ensure job seeker progression on the pathway

- Analyze healthcare employer repeat, satisfaction and penetration rates as well as business identified measures (such as reduced turnover costs) to gauge if career pathway work is meeting employer needs

CAREER PATHWAYS – ACT

- If data analysis confirms career pathways work is successful, expand strategy to additional healthcare occupations and/or other high growth industries.

- If successful, also continue strategy in Health Care by continuously working through the sector partnership to continuously modify the programming and services in the pathway meet industries' changing needs.

QUESTIONS?

REFERENCES:

Federal

Department of Labor Logic Model Online Training

Guide to State and Local Workforce Data

Career Pathways Toolkit

State

- WIOA Local Workforce Development Board Plans
- WIOA Quarterly Reports
- Local Workforce Development Board Resources
- DEO One-Stop Learning Management

THANK YOU!

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APPENDICES
ADDITIONAL SCENARIOS

YOUTH SERVICE STRATEGY

Improve career exploration, educational attainment and skills training for in-demand industries and occupations for Florida youth that lead to enhanced employment, career development, credentialing and postsecondary education opportunities.

Gap Analysis

- Youth program enrollments, exiters and employments are declining
- Youth postsecondary enrollments declining
- Low number of Youth are placed with in-demand industries

Potential Solutions

- Work with secondary schools to assist in transitioning graduates to postsecondary
- Partner w/ in-demand industries with entry-level position vacancies

- Gap Analysis

- Brainstorming

- Strategizing

LOGIC MODEL: YOUTH SERVICE STRATEGY

ACTIVITIES	OUTPUTS	SHORT-TERM OUTCOMES	INTERMEDIATE OUTCOMES	LONG-TERM OUTCOMES
Data pull for Youth aggregated by: secondary enrollees, completers, Youth employed exiters, Youth unemployed exiters Follow-up with groups above & partners to connect w/ postsecondary & in-demand industries	Contacts with a larger variety of Youth Contacts with more Youth	Increased Youth awareness of education and employment opportunities Increased collaboration with partners (High schools, CTCs, in-demand industries)	Increased postsecondary enrollments Increased in-demand industry placements	WIOA Performance achieved (both Credential Attainment and Measurable Skill Gains) Improved partner relationships

CONTINUOUS IMPROVEMENT: YOUTH SERVICE STRATEGY

PLAN → **DO** → **CHECK** → **ACT**

YOUTH SERVICE STRATEGY – "PLAN"

- Youth enrollments and employments are declining

- Youth who complete secondary education are neither moving into postsecondary enrollment or in-demand industry employment

- Develop targeted outreach plan to Youth secondary enrollments who complete on-time and with excellent academic progress

- Develop targeted outreach plan to Youth and in-demand industries to make connections/network

YOUTH SERVICE STRATEGY –"DO"

- Using data/reports, identify Youth who would be most successful in postsecondary education and deploy targeted outreach

- Using data/reports, identify Youth with transferable skills/education likely to lead to in-demand industry employment and deploy targeted outreach

YOUTH SERVICE STRATEGY –"CHECK"

- Analyze secondary drop-out data to identify challenges

- Create and analyze reports on targeted outreach and follow-up

YOUTH SERVICE STRATEGY –"ACT"

- If reports are a value-add, improve and standardize

- Develop new processes for outreach and follow-up

- Eliminate old processes not promoting secondary completion, postsecondary enrollment or in-demand placement

SECTOR STRATEGIES

Gap Analysis

- Employer penetration rate and repeat customer indicators are decreasing
- Business customer satisfaction is stagnant

Potential Solutions

- Integrated business services across key partners
- Partners collaborate to identify targeted sectors and develop common vision for aligning programs and resources to better serve those businesses
- Establishment of public/private, sector-based partnerships to identify industry talent pipeline needs in targeted sectors and collaboratively develop solutions to meet those needs.

- Gap Analysis

- Brainstorming

- Strategizing

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SECTOR STRATEGIES, THE LOGIC MODEL

ACTIVITIES	OUTPUTS	SHORT-TERM OUTCOMES	INTERMEDIATE OUTCOMES	LONG-TERM OUTCOMES
Develop integrated business services team Establish sector partnerships for identified sectors Use sector partnerships to identify talent pipeline needs & devise solutions	The system strategically and efficiently engages with business	Business understand the overall mission and value of the workforce system Business is a partner in developing talent pipeline solutions that really meet their needs	Development of services, supports and programming to meet the needs of the business in the sector partnership Businesses remain engaged because they see value	Talent pipeline developed and expanded WIOA performance achieved and improved Furthered economic prosperity/growth

SECTOR STRATEGIES – PLAN

- Top five high-growth industries in area are not the top five accessing career centers services, including labor exchange, ITAs, OJT, etc.

- Largest disconnect is in healthcare. Ranks fourth in area for employment and twentieth in receiving services.

- Local workforce development board engages in outreach to partners to solicit participation in and support for a healthcare industry partnership

- Local workforce development board works with business contacts, champions and intermediaries in healthcare to solicit participation in and support for a healthcare industry partnership

SECTOR STRATEGIES – DO

- Integrate business services teams to conduct coordinated outreach to targeted companies

- Revise policies and procedures across partners to ensure strategic investment in healthcare industry

- Identify business goals for the sector partnership, devise solutions to meet those goals and create custom reports to track progress

SECTOR STRATEGIES – CHECK

- Analyze service data related to healthcare companies.

- Analyze business services staff services and compare between industries, centers and staff.

- Analyze job postings data to determine whether outreach is a success.

- Analyze custom reports to determine progress toward achieving goals identified by the sector partnership

SECTOR STRATEGIES – ACT

- If data analysis confirms sector work is successful, expand strategy to additional high-growth industries.

- If successful, continue strategy in healthcare by continuously working through the sector partnership to identify and meet industry needs.