

Creating The Strategy
for Today's Needs and Tomorrow's Talent



Performance and Accountability Council

Meeting Agenda

Thursday, February 23, 2012

8:30 – 11:00 a.m. EST

FSU Turnbull Conference Center

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Welcome & Chair’s Remarks Don Gugliuzza

Self-Introductions Council Members

Review of Today’s Agenda Don Gugliuzza

**The *Florida Scorecard Workforce and Economic Development Initiative* --
Florida Chamber of Commerce Foundation Dr. Carrie Blanchard**

**Department of Economic Opportunity – “What is our role in helping people to enter,
remain, and advance in the workplace?”**

Florida’s Balanced Scorecard..... Mary Lazor / Richard Meik

Monthly and Daily Job Placement Reports..... James Finch / Tony Carter

Enterprise-wide Performance Reporting System..... Mary Lazor / Tony Carter

OPEN DISCUSSION

Chair’s Closing Remarks Don Gugliuzza

Adjourn

Performance and Accountability Council
Meeting Summary
Thursday, November 10, 2011

Members Present:

Dan Baldwin
Don Gugliuzza, Chair
Bill Law
Alex Moseley
Steve Parrish
Linda Reiter
Britt Sikes
Steven Sonenreich
Commissioner Bill Williams

Members Not Present:

Miguel Fuentes
Representative Marlene O'Toole

Welcome & Opening Remarks

Chair Don Gugliuzza welcomed the members of the new Performance & Accountability Council. Chair Gugliuzza shared with the members that he had previously served for three (3) years on the Performance and Readiness Council and he is excited about being a part of the new Performance & Accountability Council. President Hart has reiterated the importance of this Council. Governor Scott is moving forward to measure performance and this Council will be a part of these efforts.

Vice Chair Britt Sikes shared his pleasure to serve on the Board and the Performance & Accountability Council. Vice Chair Sikes noted that the Council is in a great position to accomplish things right now as the Governor has presented his direction and as Chair Gugliuzza has noted.

Chair Gugliuzza shared with the Council the discussion during the previous day by the Board Executive Committee on the importance of the Performance & Accountability Council, especially in terms of compliance. Chair Gugliuzza encouraged the Council to bring dialogue to the meetings to provide leadership to assist the regions and work on implementing best practices on a statewide basis.

Agenda/Introductions

Chair Gugliuzza provided an overview of the Council agenda noting that the Council will focus on performance measurements, statewide analytical tools, identifying appropriate talent needs for Florida's workforce system and job placements. He will ask the Council for project consideration for implementation throughout the year. Chair Gugliuzza invited the Council members to introduce themselves and share their thoughts on anticipated service on the Council. The Chair also recognized Mr. Rick Beasley and his leadership in providing the Board members with a very nice Reception and hosting the WFI Board in Region 23.

Council Charter

The Chair asked for a review of the Workforce System Accountability and Transparency--Performance and Accountability Council Charter. Mr. Dan Baldwin read a portion of the Charter with discussion on the Charter. Chair Gugliuzza noted the mandates relating to regional needs, ensuring compliance with common measures, reviewing and analyzing federal reports, state and regional outcomes, and the design, recommendation and oversight of performance-based incentives.

The Chair noted that the Council would focus on the regional scorecard and also potentially provide monthly teleconferences for the Council. Mr. Moseley asked if the Council would be addressing the structure for regional performance-based incentives. Mr. Gugliuzza confirmed that the Council would be addressing the incentives for the regions, probably at a later meeting and recommended that the Council provide an initial focus on the scorecard.

Performance Metrics, Reporting and Florida Chamber Foundation Scorecard

Mrs. Lois Scott provided an overview of Performance Measurement Reporting. Mrs. Scott recognized the Department of Economic Opportunity units—Unemployment Compensation Unit and the Workforce Services and Program Support Unit. Mrs. Scott shared with the Council that the Workforce Services and Program Support Unit provides technical assistance, programmatic monitoring and contractual management. Mrs. Scott recognized the Performance and Reporting Unit led by Mr. Tony Carter and expressed appreciation to Chair Gugliuzza for his kind words on this unit's service. Based on federal performance standards, the Council received a comprehensive package reflecting the federal performance reports. Technical assistance includes regular conference calls, on-site regional board support and evaluation of performance measures generated at the state and federal levels. Mrs. Scott explained the development of the Common Measures and statewide evaluation. This year, 15 of the 24 regions will be visited as part of the work of the Performance and Reporting Unit. Governor Scott has requested information on daily and monthly placement activity. Work is being completed to respond to the Governor's request. Eleven of the 24 regions are delivering direct services. The remaining regions have contracts with service providers. The Performance and Reporting Unit is also using a New Hire Report completed by employers. Federal requirements are outcome-based and information is gathered from the regions and these reflect short and long-term outcomes. Reporting also is based on targeted populations and demands. Any additional reporting requests from the Council would be a part of the work by the Performance and Reporting Unit.

Chair Gugliuzza asked the Council to embrace the reports as noted by Mrs. Scott and asked the timing of the data provided to the Governor. Mrs. Scott shared that the Governor receives data as available on a daily basis and then also potentially a monthly report as it has been expressed at this time.

Mr. Sikes noted that the summary of the number jobs open on November 3rd was 170,000 and asked for input on how this data is collected. Mrs. Scott noted two sources: job orders placed on the Employ Florida Marketplace System by the regional workforce boards and the number of jobs that are "spidered" from other job advertisements. Some companies list job orders that may not be available at this time and may list positions as anticipated jobs. Supply and demand reports also provide information on talent needs and alignment with job opportunities.

Council member, Bill Law, noted the need for "direction and velocity" as many business owners utilize in business management. Consider the differences in "management" reports and "performance" reports. Mrs. Scott noted that the Governor's request is specifically addressing placements. Discussion continued on the number of jobs available and potential tools to verify actual jobs available, role of case managers to match skills to available jobs, employer knowledge of needed skills as posted in Employ Florida Marketplace and the process where the regions evaluate the time period of jobs posted. Mr. Sikes expressed appreciation for the clarification on the number of jobs available.

Chair Gugliuzza expressed appreciation to Council members for their input, to participating regions for their comments and to Mrs. Scott for her report on performance metrics and reporting.

U.S. Department of Labor 2010-2011 WIA Annual Report

Mr. Jay Barber presented a summary of the U.S. Department of Labor 2010-2011 WIA Annual Report. Mr. Barber noted that this is a reporting requirement of the U.S. Department of Labor and referenced the two-page summary provided in Council materials. The Report is coordinated by WFI and the Department of Economic Opportunity and reflects common measures by goals and performance outcomes. Additionally, average program costs by individuals served and individuals placed are included by funding streams (Adult, Dislocated Worker and Youth). Also included were statistics on State-Level Initiatives for 2010-2011.

Florida Chamber Foundation's Six Pillar Scorecard

Chair Gugliuzza provided an overview of the Florida Chamber Foundation's Six Pillar Scorecard and the Foundation's Caucus System. Several WFI Board members serve as Caucus members to contribute on statewide issues. Under President Hart's leadership, WFI is working closely with the Florida Chamber Foundation to establish a Workforce and Economic Development Scorecard. Mary Lazor presented plans to align WFI's strategic initiatives with three of the Foundation's Six Pillars: Innovation and Economic Development; Talent Supply and Education; Business Climate and Competitiveness. The Workforce and Economic Development Scorecard will also include Florida performance metrics and key performance indicators with national comparisons. Commissioner Bill Williams expressed his appreciation for the alignment with the Chamber Foundation's Six Pillar System and the importance of this information for local decision-making.

Statewide Workforce & Economic Development Strategic Plan/Talent Development

Chair Gugliuzza and Mary Lazor shared background information with the Council on the development of the Board's five-year Strategic Plan, specifically the establishment of the Goal: Aligned, Responsive, Jointly Engaged Talent Supply Chain. Ms. Lazor noted that President Hart was working closely with the Florida Higher Education Coordinating Council representative of the Commissioner of Education; Chancellors of Florida State Colleges and the State University System; President, Independent Colleges & Universities; Commission on Independent Education; Early Learning and Business representatives. The WFI Board adopted Project H: Operational and Informed Talent Supply Chain Team (TSCT). The mission of the TSCT is to strengthen and transform Florida's talent development system focused on demand-driven job opportunities and globally-relevant talent. The business community has been extremely engaged in the TSCT. President Hart has presented this project to members of the Florida Legislature, Executive Office of the Governor, etc. Through the partnership with Fairfield Index, Inc., the Talent Supply Chain Team was convened with four meetings throughout 2011. Kevin Lloyd, Fairfield Index addressed the Council providing a comprehensive presentation of the Florida Supply Chain Model. The Model has been adopted by the Talent Supply Chain Team with the following components: Customers, Outputs, Process, Inputs and Suppliers. Mr. Lloyd shared the TSCT Model was developed to provide educational delivery systems and business stakeholders with opportunities to identify talent development pressure points and tools to promote understanding and responsive decisions. The Talent Supply Chain Team will focus on aligning talent development to Florida's business and economic development needs with the adoption of the following demand-driven definition: "Florida's demand-driven talent supply chain advances economic prosperity through agile and responsive actions delivering just-in-time knowledge and skills to meet the current and future occupational needs of Florida's businesses in a diverse globally-integrated economy." Mr. Sonenreich asked if the issue of Florida's housing needs is being addressed in this talent supply initiative? Ms. Lazor noted housing needs are being addressed through the Statewide Strategic Plan, as required by 2011 SB 2156. President Law shared background information on the role of the Florida College System in talent development and with the goal of local training for local demands.

Project for Funding Consideration –Statewide Efficiency and Effectiveness Initiative

Chair Gugliuzza provided an overview of WFI Board action providing funding to the three Board Councils with the Performance & Accountability funding award of \$722,500. The Chair presented the staff recommendation to set aside funding based on the Performance & Accountability Council Charter for the operational project – Statewide Efficiency and Effectiveness Initiative. This Initiative provides the Council with the opportunity to assess performance measurement needs and explore a potential Invitation to Negotiate up to the amount of \$500,000 to assist with regional workforce boards and statewide performance measurement and reporting. Commissioner Bill Williams expressed his appreciation to take this opportunity for the identification of immediate Council action to provide real-time tools for our regional workforce boards with many different components, addressing broad talent supply. Mr. Moseley expressed the potential need for additional funding in support of enhancing performance measurement and reporting tools on an ongoing basis. Discussion also included the issue of proprietary development of performance measurement tools at the regional levels. Chair Gugliuzza requested a January teleconference for further discussion of statewide performance measurement and reporting. Motion was made by President Law and seconded by Commissioner Williams to set-aside up to \$500,000 for the Statewide Efficiency and Effectiveness Initiative.

Chair’s Closing Remarks

Chair Gugliuzza recognized Council members for their input and encouraged future dialogue as Performance & Accountability issues are brought before the Council.

The meeting adjourned at 11:10 a.m.



**The Florida Scorecard Workforce and Economic
Development Initiative
Implementation Plan**

A joint initiative by the Florida Chamber Foundation and Workforce Florida, Inc.

Table of Contents

Purpose and Overview of the Initiative.....3

Implementation Plan of Deliverable: Workforce and Economic Development Analytics

- Data Collection and Inventory.....6
- Web Development Strategy.....7
- Index of Workforce Metrics.....8
- Historical Comparison and Policy Alternatives.....10

Implementation Plan of Deliverable: Quarterly Workforce and Economic Development Reports

- Monthly and Quarterly Trend Analysis13

Deliverable: 2012 Comprehensive Final Report.....14

Appendix A15

Purpose and Overview of the Initiative

At a time when approximately 926,000 Floridians are unemployed and an even greater number are marginally attached and discouraged from seeking employment, the stakes to find solutions in workforce and economic development have not been greater. To respond to this challenge, in 2012 the Florida Chamber Foundation will partner with Workforce Florida, Inc. to pursue an initiative that will provide data driven measurement and evaluation of Florida's workforce and economic development systems. Based upon the Six Pillars™ framework and leveraging the electronic platform of The Florida Scorecard™, the initiative will identify key trends that impact the workforce system, as well as produce relevant analysis of key economic data on a monthly basis. The analysis will be regularly presented to the Workforce Florida Board of Directors and partnering organizations to support decision making and solutions to align policy with the current challenges and opportunities that face Florida.

In 2009, The Workforce Florida, Inc. Board of Directors adopted a five-year (2010-2011) Strategic Plan, "Creating the Strategy for Today's Needs and Tomorrow's Talent," as required by Section 445.006, Florida Statute. In March 2010, the U.S. Department of Labor conducted a comprehensive review of Florida's Workforce System and identified the 2010-2011 Strategic Plan as a Best Practice and further noted that "Moving Florida's robust strategic plan forward will continue to be labor-intensive." In 2011, the Governor and Florida Legislature enacted SB 2156, (Chapter 2011-142, L.O.F.) creating the Florida Department of Economic Opportunity (DEO). This legislation requires included mandates that the DEO would develop and regularly update a 5-year Statewide Strategic Plan. The legislation also included requirements that the DEO would involve Enterprise Florida, Inc.; Workforce Florida, Inc.; local governments; the general public; local and regional economic development organizations; other local, state, and federal economic, international, and workforce development entities; the business community; and educational institutions in developing the Strategic Plan. This Contract and related documents provides for support of the WFI strategic planning operating projects and the development of the 5-year Statewide Strategic Plan.

The Florida Scorecard Workforce and Economic Development Initiative, hereafter referred to as the Initiative, is designed to support the 2010-2015 Strategic Plan for Workforce Development and the goals and projects contained therein. Specifically, the Initiative will inform and complement the following strategic projects including outcomes to-date of Workforce Florida, Inc.:

- Project A – Develop a Cluster and Infrastructure-Oriented, Comprehensive Workforce Supply and Demand Analysis
- Project B – Customer Satisfaction Index for Target Industry Clusters and Infrastructure Innovators
- Project D – Workforce Investment Act Reauthorization Requirements and Expectations
- Project H – Convene and Support Talent Supply Chain Team for High Performance Expectations in Strategic Plan
- Project I – Stem Leadership for Florida

- Project J – The Best Informed Target Industry Cluster-specific Task Forces
- Project L – Workforce Dashboard

Using the Florida Chamber Foundation’s organizing framework known as the Six Pillars of Florida’s Future Economy, the Initiative will provide measurement and evaluative tools related to the workforce system and the economic performance of the state of Florida.

The Foundation will embark upon a two-tiered approach to provide workforce and economic development analytics which will assist the strategic decision making of the Workforce Florida Board of Directors, staff and collaborative partners. The first tier will focus on the analysis of specific data elements currently collected among state and other governmental entities that intersect with the workforce system. In order to have a comprehensive inventory of data, the Florida Chamber Foundation (Foundation) will take the lead on scheduling fact finding meetings with key stakeholders to obtain information on their performance metrics. A corresponding web development strategy will integrate the key performance metrics through an accessible electronic platform, The Florida Scorecard. The Foundation will then utilize the input and data collected in these meetings to produce an Index of Workforce Metrics. This Index will statistically assess the workforce system’s performance over time.

The second tier of analytics will focus on the broader contextual perspective of trends and events that may impact Florida’s economy and workforce system. The activities related to this objective will include a historical analysis of employment conditions in the state of Florida and identify common factors during times of economic expansion, contraction and recession. By systematically examining both levels of analysis, a more comprehensive picture of the workforce system’s performance will be possible. The findings of this two-tiered approach will inform the policy alternatives and recommendations provided to the Workforce Florida Board of Directors.

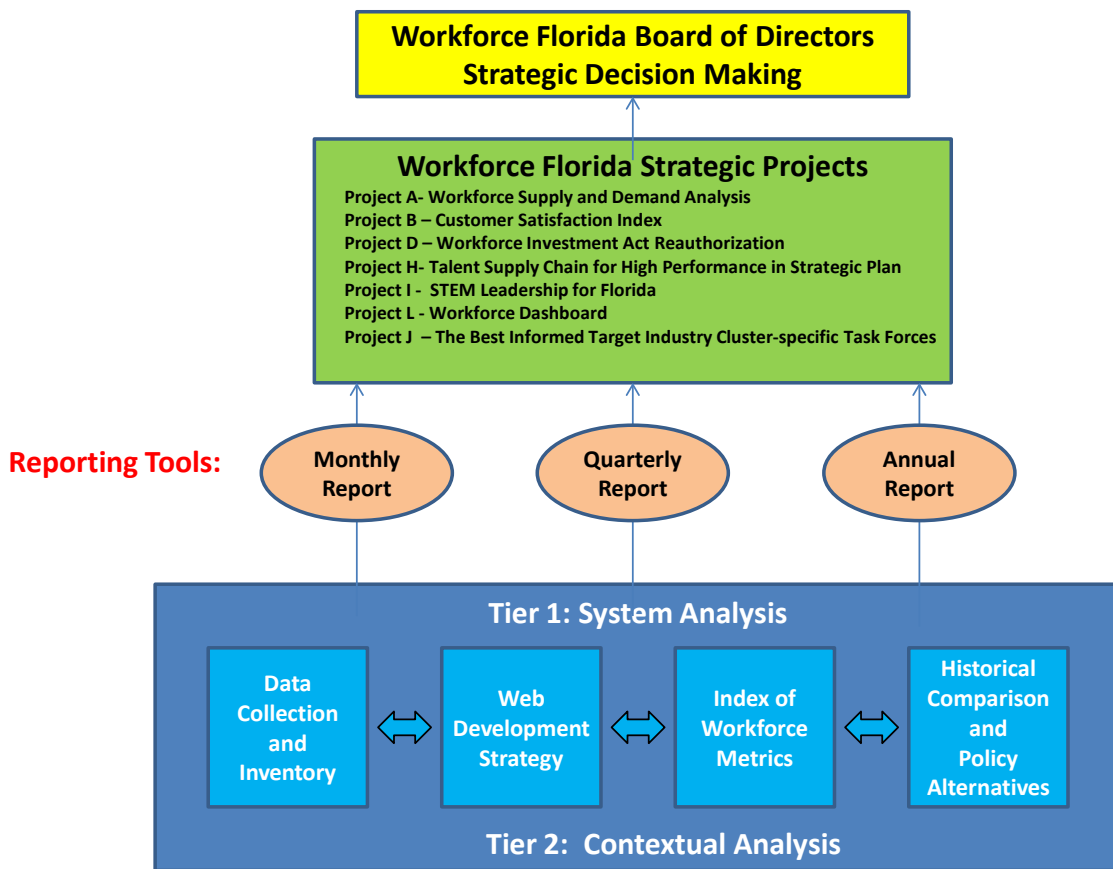
In addition to the Workforce and Economic Development Analytics objectives, reporting tools will be produced on a monthly and quarterly basis which will incorporate data contained within The Florida Scorecard as well as additional economic data sources. The purpose of these reports will be to continuously evaluate key employment, talent supply/demand, and economic events and projections as it pertains to the Workforce Florida’s Strategic Plan/Operating Projects and the Statewide Strategic Plan. A repository of regularly reported indicators as well as potentially disruptive occurrences, such as natural disasters, financial market shifts or sharp swings in commodity prices will be included. These reports will serve as vehicles to inform the strategic decisions and Operating Projects considered by the Workforce Florida Board of Directors.

In order to accomplish the objectives outlined within the proposal, coordination among key stakeholders including Workforce Florida, the Department of Economic Opportunity, the Department of Education, Florida Eight, STEM Florida, the Talent Supply Chain Team and the Higher Education Coordinating Council will be imperative. The Florida Chamber Foundation will take the

lead in coordinating activities and scheduling meetings with these stakeholders to acquire relevant data and information.

The term of the initiative will span from January 2012 through October 2012. For each deliverable outlined in this document, one electronic copy and two printed copies will be provided to Workforce Florida. The Florida Chamber Foundation will also be available to make presentations to the Workforce Board of Directors as well as participate in the meetings of the Talent Supply Chain Team related to the activities and implementation of this joint initiative.

Figure 1. Conceptual Map of The Florida Scorecard Workforce and Economic Development Initiative



Implementation Plan of Deliverable: Workforce and Economic Development Analytics

Data Collection and Inventory. Initial meetings will be scheduled with state agencies and other governmental entities pertaining to the Initiative in the months of January and February. The purpose of these meetings will be to identify leading metrics collected by these entities that provide insight into Florida's workforce and economic development systems. The information obtained from these meetings will be utilized in the evaluative methods of creating the Index of Workforce Metrics as well as making comparisons of statewide economic performance.

It is anticipated that the following organizations will be contacted by the Florida Chamber Foundation related to data inventory and collection for the Initiative:

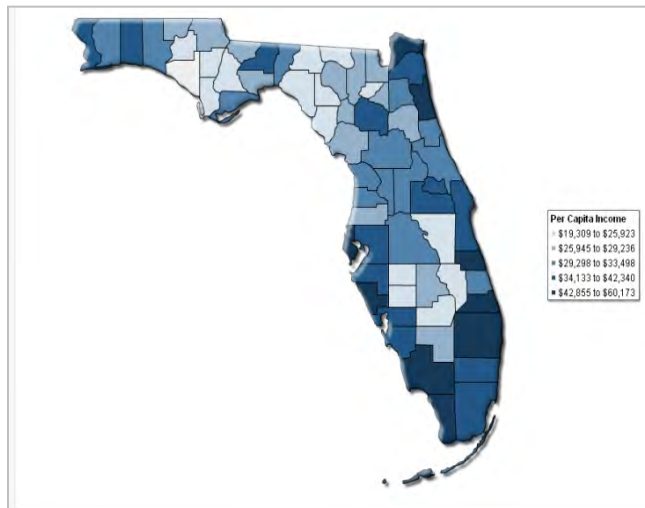
- Department of Business and Professional Regulation
- Department of Economic Opportunity (including the Labor Market Statistics Center and Office of Unemployment Compensation)
- Office of Economic and Demographic Research
- Department of Education
- Enterprise Florida
- Florida Association of Postsecondary Schools and Colleges
- Florida College System
- Space Florida
- State University System
- VISIT FLORIDA
- Workforce Florida

Multiple data sources will be reviewed for the implementation of the initiative which will include but are not limited to: The Department of Economic Opportunity Performance Measures and Labor Market Statistics, Wagner-Peyser Employ Florida Marketplace report data, Workforce Investment Act Quarterly Reports, Florida Education Training and Placement Information Program (FETPIP), Florida College System data, Employ Florida Banner Center reports, the Balanced Scorecard Measures, and Quarterly Key Measures and Monthly Management Reports from Workforce Florida.

Subsequent meetings will be held to assist in the data collection, inventory and coordination on an as-needed basis. It is anticipated that electronic data sharing with these partners will be necessary to fully access and use the data for the Initiative. In most instances, the Foundation will request that non-confidential data be shared in the format of an Excel spreadsheet to ensure compatibility with future website and statistical management for the initiative.

Web Development Strategy. As a result of the data inventory conducted with state agencies and governmental organizations, key performance measures will be jointly identified with Workforce Florida for integration within The Florida Scorecard. The Florida Scorecard was first established in 2009 to serve as a premier site that offers accountability, transparency and quality data for a diverse audience of businesses, community leaders, government officials and the citizenry at large. Data contained on The Florida Scorecard is a free and accessible via the electronic website. A recent screen capture of The Florida Scorecard is provided in Appendix A.

Figure 2. County Heat Map displaying Per Capita Income



On The Florida Scorecard, measures are provided at national, state, county and metropolitan levels. Interactive charts and maps such as the one shown in Figure 2, allow users to view statewide data or to select metro and county metrics of interest. An initial assessment of metrics that currently reside within The Florida Scorecard has been performed with the result that a number of metrics have been identified as relevant to the input and outcome measures of the workforce system. Examples of these metrics

include Average Annual Wage, College Attainment, Science and Engineering Students, Productivity, New Business Growth, Research & Development, Monthly Employment, and Cost of Doing Business.

By building capacity within The Florida Scorecard to accommodate new state data the website will serve as an information repository for economic and workforce data, with the additional benefit of being organized by the common Six Pillars framework. In order to accomplish these objectives the Foundation will incorporate new data related to the workforce system into The Florida Scorecard, with a particular emphasis on the Pillars of Talent Supply and Education, Innovation and Economic Development, and Business Climate and Competitiveness. By integrating new workforce data into The Florida Scorecard, the accessibility of comprehensive state level data will be increased for use by communities, regions, customers and partners of the workforce system.

Graphic elements that reflect the joint initiative such as the Workforce Florida logo will be embedded as appropriate into relevant web pages of The Florida Scorecard. Future plans for The Florida Scorecard will include continuing to link measurement to the statewide strategic plans in order to support the decision making of stakeholders.

Index of Workforce Metrics. Recently, the Florida Chamber Foundation developed the Six Pillars Index™ to measure Florida’s progress within each of the Six Pillars. The Foundation will develop a parallel Index for Florida’s workforce system based upon key performance measures that statistically demonstrates the leading contributors of workforce performance in consultation with objectives of the statewide strategic plan.

The data used in the development of the Index of Workforce Metrics (Index) will come from the data partners and resources discussed in the previous section related to Data Collection and Inventory. The Index will be developed through a statistical formula which standardizes and weighs the contribution of a number of indicators that will comprise the Index. The Foundation will take advantage of various robust statistical techniques which include standardized measurement techniques (i.e., Z-scores, Normalized Data) and factor analysis to develop the Index. The purpose of the Index of Workforce Metrics will be:

- Provide integrative values that measure the current Florida workforce system
- Provide the data for comprehensive workforce supply and demand analysis
- Suggest policy implications to build effective workforce system within economic context
- Improve the accountability by regularly announcing the Index to stakeholders

The Index will represent the current status of a Florida workforce system as a proxy measure from various workforce system indicators. The Index will be used as in supporting the strategic decision-making, data analyses and policy alternatives of Workforce Florida and their data-driven management objectives. As a result of the Index, Workforce Florida will have a stable tool which both informs and holds the Florida workforce system accountable with the regular reporting of the Index.

Possible indicators will be identified and collected from the process addressed in the Data Collection and Inventory section as well as the initial assessment of metrics contained within The Florida Scorecard. The previously developed Six Pillars Index will provide insightful analytical implications and tools to develop the Index of Workforce Metrics. The Foundation will take advantage of the statistical techniques and formula aligned with those of the Six Pillars Index to provide meaningful analysis. The process to derive the Index of Workforce Metrics will be accomplished by:

- (1) Identification and collection of key indicators
- (2) Decision of statistical analysis techniques

- (3) Data collection for the analysis
- (4) Running a factor analysis with all indicators
- (5) Selection of final indicators based upon results from the factor analysis
- (6) Calculation of the Index from a formula consistent with the Foundation’s current formula
- (7) Review of the final Index from an external expert committee
- (8) Report/announcement

The Foundation will consult a variety of partners and resources in the development of the Index. Trained doctoral researchers in public policy and economics will conduct a statistical analysis of developing the Index by using various robust statistical techniques and analytic tools. The statistical analysis and Index calculation will be reviewed by the Foundation’s Econometrics Council composed of experts in economic data analysis. Possible partners and resources for this deliverable include the following table and links:

Table 1. Econometrics Council 2010-2011

Name	Institutions
Ms. Jennifer Chapman	Fidelity Investments
Dr. William Christiansen	Florida State University
Mr. Ben Warner	Jacksonville Community Council, Inc.
Dr. Rick Harper	University of West Florida
Dr. William Seyfried	Rollins College
Dr. Sean Snaith	University of Central Florida
Ms. Kara Collins-Gomez	Office of Program Policy Analysis and Government Accountability
Mr. Mark Vitner	Wells Fargo Securities

Resource Links

- <http://www.thefloridascorecard.com/index.aspx>
- <http://www-958.ibm.com/software/data/cognos/manyeyes/page/VisualizationOptions.html>
- <http://www-01.ibm.com/software/analytics/spss/products/statistics/>
- <http://www.statmodel.com/>
- <http://www.statsoft.com/textbook/principal-components-factor-analysis/>

Figure 3. Current Florida Scorecard Index



Historical Comparison and Policy Alternatives. The workforce system is indispensable to economic development in the state of Florida in its mission to provide an able talent supply that meets the needs of business and industry partners. The Florida Chamber Foundation has identified leading indicators, such as a talent supply, which contribute to economic development outcomes across six policy areas. As part of the Initiative, the Foundation will develop policy alternatives to inform Florida’s workforce policies based upon historical analyses during times of economic expansion, contraction and recession. The purpose of the historical comparison and policy alternatives will be:

- To provide descriptive historical trends of the performance in Florida workforce system
- To identify success factors of the workforce system within the context of economic conditions
- To determine implications from the case analyses of the workforce system practices
- To develop policy alternatives to inform Florida workforce policies

The Foundation will use qualitative and quantitative methods to perform historical analysis of the performance data in Florida workforce system during periods of differing economic conditions. The analyses will include:

- (1) Descriptive historical trends of the performance in the Florida workforce system
- (2) Time-series modeling of key indicators of the Florida workforce system
- (3) Path analyses/structural equation modeling between key success factors
- (4) Case studies of Florida’s workforce system performance

(5) Reports of policy alternatives based upon these analyses

The Foundation will take advantage of internal and external partners and resources to produce the historical analysis and policy alternatives framework. Doctoral trained researchers in public policy and economics will conduct statistical analysis using robust techniques and a variety of software tools such as SPSS, M-plus and HLM. The statistical analyses will be reviewed with the Foundation's Econometrics Council, which is composed of experts in economic data and policy analysis.

Finally, the Six Pillars Caucus System™ will assist the Foundation in developing policy alternatives to better Florida's workforce system from the strategic perspective. The Caucus System is comprised of more than 400 top business leaders and issue experts from around the state charged with drafting the first-ever, statewide strategic plan to help guide Florida to a future economy that includes high-wage jobs, global competitiveness and vibrant communities. Now in its third year, the Caucus has created the first iteration of the Six Pillars 20-year Strategic Plan and will begin work on the second edition during the 2012 cycle. The strategies and tactics contained within the Six Pillars 20-Year strategic plans will serve as a source of input for policy recommendations related to the Initiative.

Other possible resources and sample analysis related to this deliverable include the following:

Resource Links

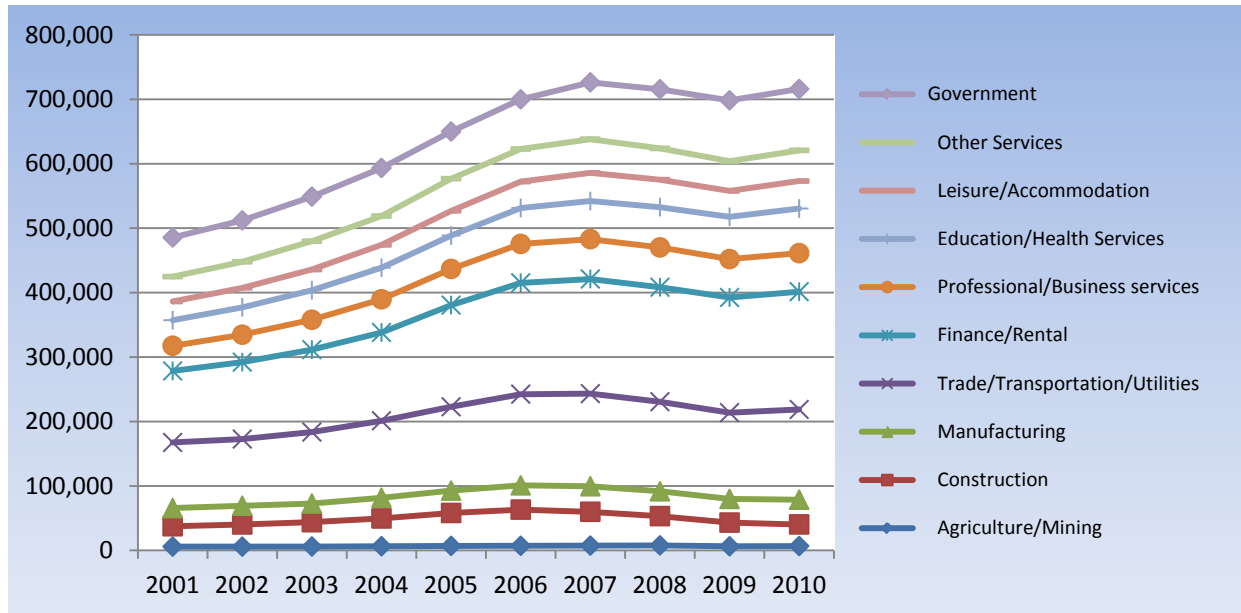
<http://www.thefloridascorecard.com/index.aspx>

<https://files.nyu.edu/mrg217/public/timeseries.pdf>

<http://www.creative-wisdom.com/teaching/WBI/SEM.shtml>

<http://davidakenny.net/cm/mediate.htm#BK>

Historical Trends of Contribution to Gross State Product by Industry



Time-Series Modeling in Key Indicators

$$Y_{it}(\text{Outcomes}) = \beta_{1t}(\text{STEM Talent}) + \beta_{2t}(\text{Job Training}) + \beta_{3t}(\text{K 12 Test Scores}) + \beta_{4t}(\text{Graduation Rate}) + \beta_{5t}(\text{Workforce Development Investment}) + \dots + \epsilon_{it}$$

Possible Outcomes: Unemployment Rate, Business Startup/Closing
 i: Individual level, such as a County, t: Year

20-Year Six Pillars Strategic Plan: Sample Policy Recommendations for Improving STEM Talent

- Sample Policy Recommendations**
- Recommendation 1: Define and diversify the measures of STEM talent
 - Recommendation 2: Reach consensus on desirable outcomes of STEM programs
 - Recommendation 3: Inventory effective STEM programs and encourage new programs
 - Recommendation 4: Make STEM opportunities more accessible across all regions
 - Recommendation 5: Improve STEM teacher qualifications and education

Implementation Plan of Deliverable: Quarterly Workforce and Economic Development Reports

Monthly and Quarterly Trend Analysis. The Initiative will provide information related to the changing demands of Florida’s economy and the implications for workforce development based upon the needs of business and as the economy at large. Monthly reports based upon regularly reported data will include topics of employment information, housing and unique business data. Comparison over the last reporting period (i.e., monthly or quarterly) as well as an annual approach of a year-over figure will be provided. Foundation staff will work directly with Workforce Florida staff to refine the list of regularly reported metrics to assure a targeted link to the Workforce Florida Strategic/Operating Plans and the statewide strategic plan.

Table 2. Regularly Reported Metrics (in alphabetical order)

Metric	Frequency	Source
Business Relocations	Quarterly	Dun & Bradstreet
Consumer Confidence	Monthly	Bureau of Economic and Business Research/University of Michigan Survey
Consumer Price Index	Monthly	Bureau of Labor Statistics
Employment	Monthly	DEO and Bureau of Labor Statistics
Employment Change by Industry	Quarterly	DEO
Employment Projections by Industry		Economic and Demographic Research
Gross Domestic Product (Real)	Quarterly	Bureau of Economic Analysis
Fiscal Stress by Industry	Quarterly	Dun & Bradstreet
Home Foreclosures	Monthly	DEO and RealtyTrac
Housing Sales	Quarterly	National Association of Realtors
Personal Income	Quarterly	Bureau of Economic Analysis
Population Projections		Economic and Demographic Research
Small Business Hiring Plans	Quarterly	Florida Chamber of Commerce
Unemployment Rate	Monthly	DEO and Bureau of Labor Statistics

Updates of Florida specific information and analysis will be provided to the Workforce Florida Board of Directors during their Board meetings in the months of February, May, August and November. The quarterly reports will be based upon the aggregation of monthly data as well as data that is published on a quarterly basis. In addition to providing information on regularly reported data, the reporting tools will also identify events and trends that occur on a global and national level that may impact the workforce and economic development systems of Florida. Such information may include potentially disruptive events to the economy and workforce system such as natural disasters, financial market shifts or sharp swings in commodity prices. Further recommendations for policy options and alternatives will be provided where applicable within the monthly and quarterly assessment of data and information. Collectively, these reports will serve to inform the strategic decisions and Operating Projects considered by the Workforce Florida Board of Directors, staff and collaborative partners.

Deliverable: 2012 Comprehensive Final Report

As the final deliverable of the Initiative, a comprehensive final report will be developed to summarize the services, data and tools that have been provided to Workforce Florida, Inc. throughout the term of the contract. In addition to discussing the result of activities and objectives that have occurred, the final report will contain recommendations related to the future activities and direction for Workforce Florida, particularly as it pertains to data analysis and measurement.

BALANCED SCORECARD



Measures approved by the Workforce Florida Board of Directors

Performance Measures

Services to Job Seekers

Job Seeker Entered Employment Rate (Wagner-Peyser)
January 1, 2010 - December 31, 2010

Veterans Entered Employment Rate (Wagner-Peyser)
January 1, 2010 - December 31, 2010

Customer Satisfaction - Job Seekers (Wagner-Peyser)
Data Not Available

Services to Employers

Employer Market Penetration (State Level Only Measure)
January - March 2011

Customer Satisfaction - Employers
Data Not Available

Services to Disadvantaged Groups, Unemployed Adults, and Youth

Entered Employment Rate (Workforce Investment Act)
July 1, 2010 - June 30, 2011

Employment Earnings Rate (Workforce Investment Act)
January 1, 2010 - December 31, 2010

Employment Retention Rate (Workforce Investment Act)
July 1, 2009 - June 30, 2010

Youth Average Grade Level Gain (Workforce Investment Act)(N/A)

Youth Positive Outcome Rate (Workforce Investment Act)
July 1, 2009 - June 30, 2010

Customer Satisfaction - Workforce Investment Act Participants
Data Not Available

Services to Welfare Recipients

Welfare Closed Case Outcome Rate
July 1, 2010 - June 30, 2011

Welfare Transition Earnings Rate
January 1, 2010 - December 31, 2010

Welfare Transition Retention Rate
July 1, 2009 - June 30, 2010

Notes

Notes: The Employer Penetration Measure is a statewide annual measure and is displayed in a separate report. The Youth Grade Level Gain measure is pending implementation.

Threshold Indicators

Level of service to all Customers

To achieve this threshold, the level of service provided to the Workforce Investment Act, and Wagner-Peyser customer groups, must equate to at least 80% of the level of total funding allocated by formula to the Regional Workforce Board.

Level of service to Special Customers

To achieve this threshold, the level of service provided to special customer groups--Disabled, Veterans, Offender, and Youth Aging out of Foster Care, and Run-away Youth must equate to at least 80% of the level of total funding allocated to the Regional Workforce Board.

Data Validity

To achieve this threshold, Regional Workforce Boards must meet a quality level of data that is entered into the system as determined by Data Element Validation. This quality level has not been determined by the Federal Office. In addition., the federal software used for computation and disaggregating of the aggregate date is not yet available. Therefore this indicator is labeled "NA"--Not Available.

Youth Diploma Attainment

To achieve this threshold, Regional Workforce Boards must report a Youth Diploma Rate of at least 48%. The 4th QTR performance data is also found in the Table O Regional performance in the WIA Annual Report.

Welfare Participation Rate

To achieve this threshold, Regional Workforce Boards must report a Welfare Participation Rate of at least 50%. The results contained in this Balanced Scorecard are for the most recent available data (10/1/2010 - 09/30/2011).

Notes

Notes: The methodology of determining the Level of Service threshold indicators utilizes the participant and allocated funding data for the following programs: Workforce Investment Act Program (Adults, Dislocated Workers, Older and Younger Youth), and Wagner-Peyser Act Program.

THE FUTURE

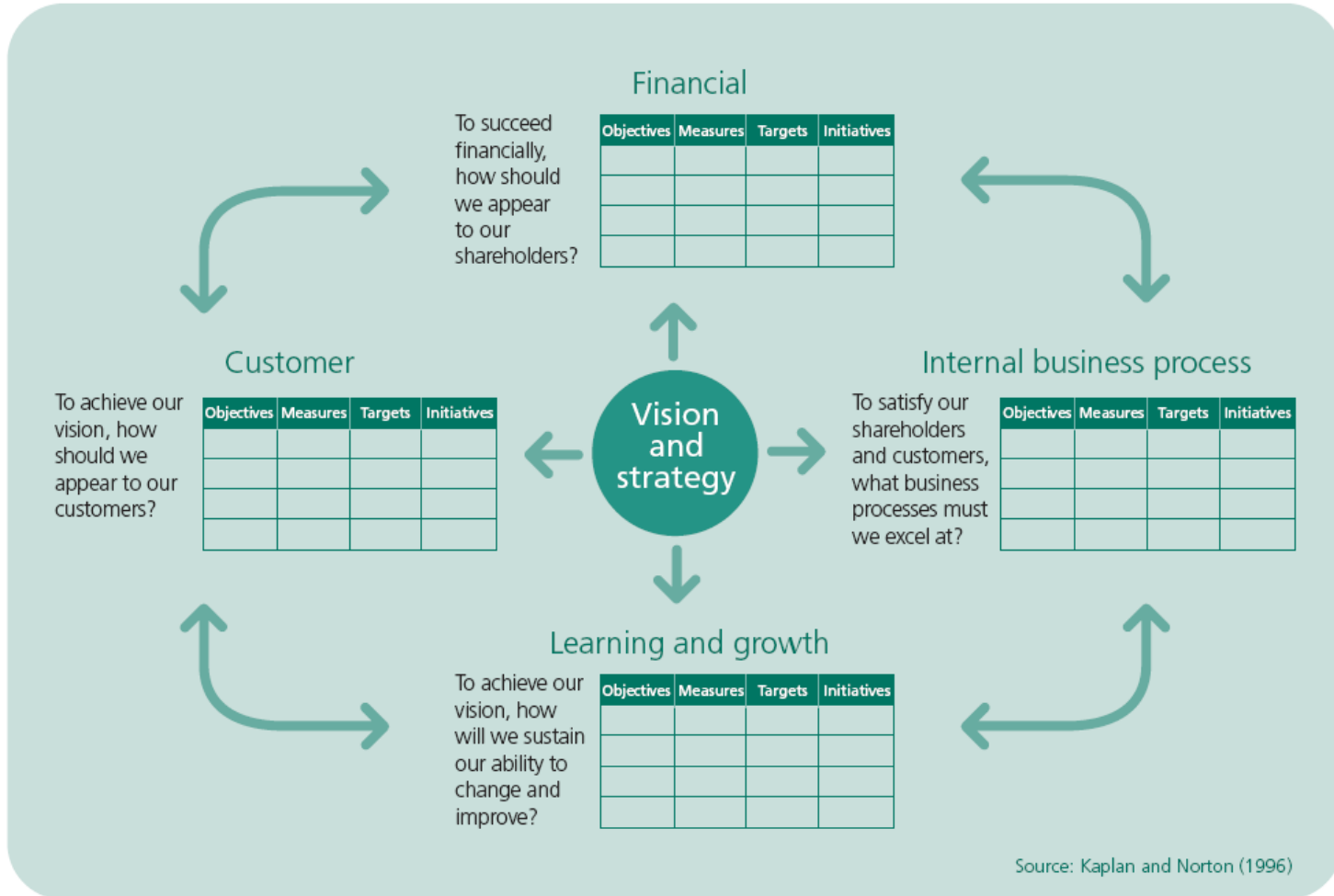
Balanced Scorecard 2.0



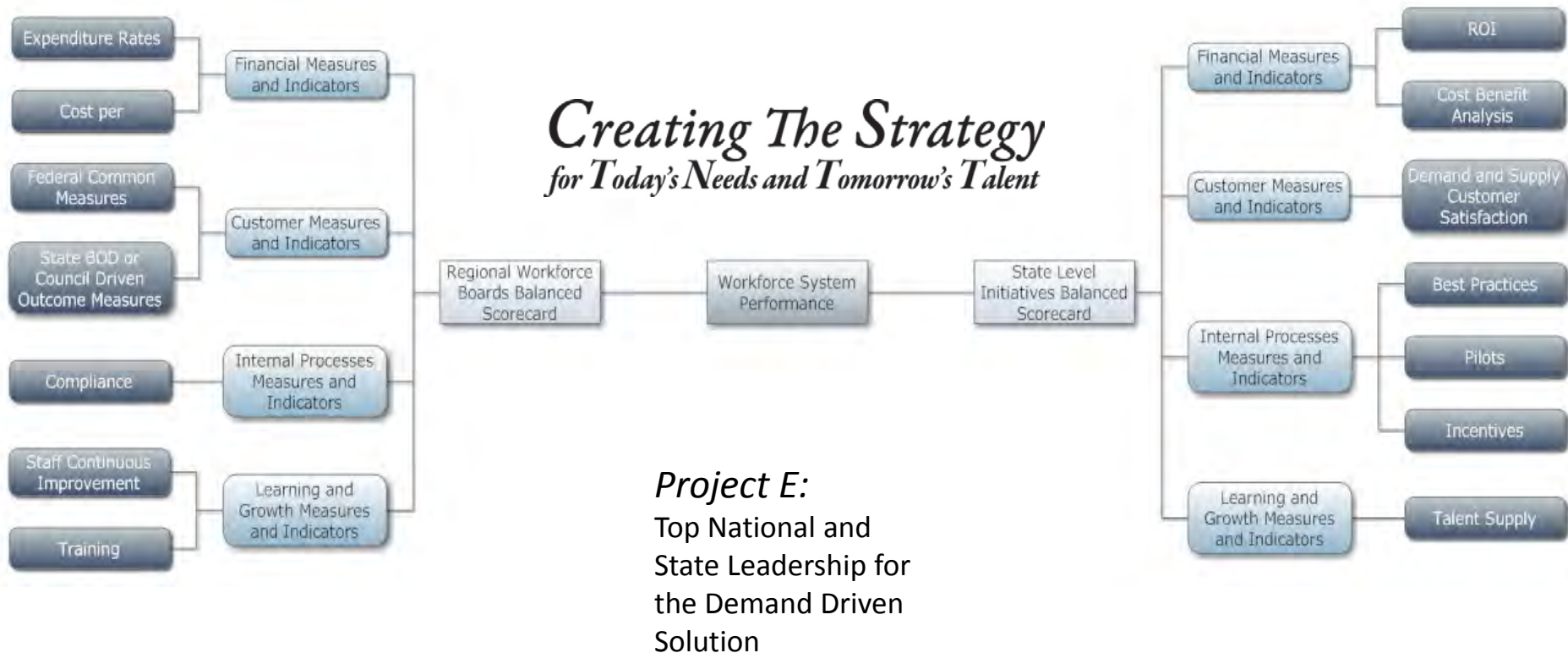
THE GOAL:

Develop a comprehensive Workforce Scorecard in line with Balanced Scorecard principles that promotes informed decisions, achievement of objectives, and continuous improvement in support of the State Strategic Plan operating plans.

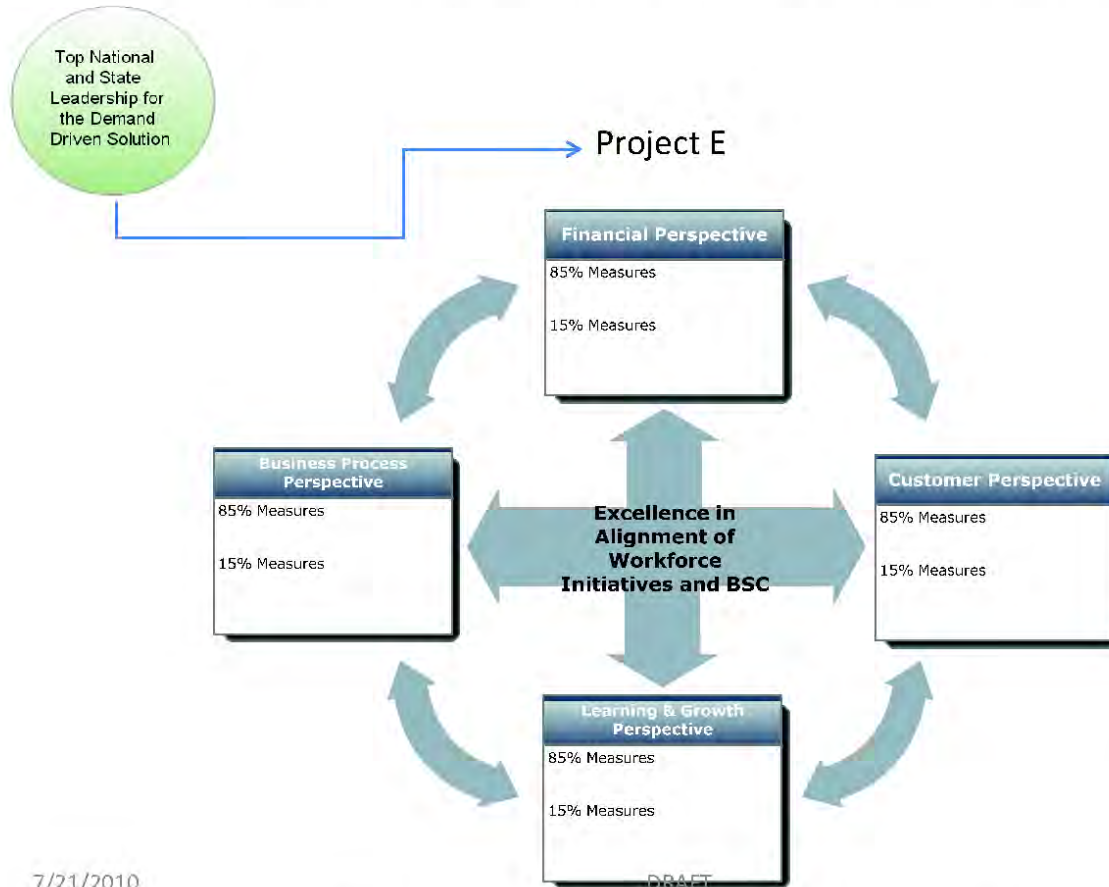
Balanced Scorecard Principles



Proposed Balanced Scorecard Delivery



Measures that Matter Most!



7/21/2010

Adapted from the Balanced Scorecard by Robert S. Kaplan and Dave P. Norton. Harvard Business School Press. 1996.

Monthly Job Placement Report - January 2012

Local Monthly Factors						Monthly Job Placement Report						
Monthly Composite Ranking	Regional Workforce Board (RWB) - Counties Served	Executive Director/Hire Date	Board Chair	Unemployment Rate - December 2011	Number of Unemployed Individuals (Includes Claimants) - December 2011	Number of Unemployment Claimants On 01/31/2012	Number of Job Openings Available - January 2012	Number of Individuals Placed in Jobs - January 2012	Number of Unemployment Claimants Placed into Jobs - January 2012	Percentage of Job Openings Filled = I/H	Percentage of Unemployment Claimants Placed into Jobs = J/G	Composite Score = $[(K*3) + L]/4$
A	B	C	D	E	F	G	H	I	J	K	L	M
1	RWB 23 - Miami-Dade, Monroe	Rick Beasley/August 2005	Alvin West	10.2%	137,965	58,138	38,657	9,552	1,335	24.71%	2.30%	19.11%
2	RWB 16 - Hernando, Pasco	Jerome Salatino /January 2010	Lex Smith	11.6%	30,072	11,728	5,281	1,311	216	24.82%	1.84%	19.08%
3	RWB 3 - Calhoun, Holmes, Jackson, Liberty, Washington	Richard Williams/Oct 2002	Darrin Wall	8.3%	4,236	1,732	1,028	175	20	17.02%	1.15%	13.06%
4	RWB 5 - Gadsden, Leon, Wakulla	Kimberly A. Moore/July 2005	Barbara Edwards	7.9%	14,689	5,681	6,256	963	123	15.39%	2.17%	12.09%
5	RWB 14 - Pinellas	Edward Peachey/February 2003	Dr. Tony Leisner	9.8%	43,209	17,987	15,692	2,267	520	14.45%	2.89%	11.56%
6	RWB 22 - Broward	Mason C. Jackson/January 1986	Gary Arenson	8.6%	84,264	37,138	29,087	3,792	1,308	13.04%	3.52%	10.66%
7	RWB 9 - Alachua, Bradford	Angela Pate/July 2005	Dr. Maggie Labarta	7.7%	10,890	3,636	6,270	742	115	11.83%	3.16%	9.67%
8	RWB 4 - Bay, Franklin, Gulf	Kimberly L. Bodine/July 1996	Gary Ross	10.0%	9,949	5,069	3,571	373	136	10.45%	2.68%	8.50%
9	RWB 20 - Indian River, Martin, Okeechobee, St. Lucie	Richard Stetson/October 2010	Soma Gail Melnick	11.2%	29,940	14,204	5,926	617	125	10.41%	0.88%	8.03%
10	RWB 7 - Columbia, Dixie, Gilchrist, Union	John Chastain/December 2001	Jennie M. Reed	9.6%	4,748	1,994	1,624	158	31	9.73%	1.55%	7.69%
11	RWB 10 - Citrus, Levy, Marion	Rusty Skinner/August 1996	Suzanne Mills	11.3%	23,237	9,593	5,405	520	153	9.62%	1.59%	7.61%
12	RWB 19 - DeSoto, Hardee, Highlands	Roger Hood/April 2005	David Royal	9.9%	6,854	2,222	4,389	408	40	9.30%	1.80%	7.42%
13	RWB 6 - Hamilton, Jefferson, Lafayette, Madison, Suwannee, Taylor	Sheryl Rehberg/September 2006	J. Douglas Whitaker	9.8%	4,728	1,908	1,283	123	17	9.59%	0.89%	7.41%
14	RWB 15 - Hillsborough	Edward Peachey/March 2010	Dennis A. Meyers	9.5%	57,168	25,079	34,808	3,187	436	9.16%	1.74%	7.30%
15	RWB 8 - Baker, Clay, Duval, Nassau, Putnam, St. Johns	Bruce Ferguson/October 2003	Elaine A. Johnson	9.3%	67,124	34,338	24,560	2,029	623	8.26%	1.81%	6.65%
16	RWB 12 - Lake, Orange, Osceola, Seminole, Sumter	Kevin Neal/Interim	Kevin W. Shaughnessy	9.4%	108,015	42,547	40,423	2,611	483	6.46%	1.14%	5.13%
17	RWB 11 - Flagler, Volusia	Rick Fraser/April 2002	John Wanamaker	10.5%	29,883	13,147	8,098	503	167	6.21%	1.27%	4.98%
18	RWB 24 - Charlotte, Collier, Glades, Hendry, Lee	Joseph Paterno/March 1997	Ken O'Leary	10.0%	50,978	18,404	18,443	1,133	168	6.14%	0.91%	4.84%
19	RWB 1 - Escambia, Santa Rosa	Susan B. Nelms/July 1996	Jay Overman	9.6%	19,897	8,328	5,721	326	85	5.70%	1.02%	4.53%
20	RWB 17 - Polk	Stacy Campbell-Domineck/September 2006	Rod Crowley	10.7%	28,742	11,602	8,060	453	81	5.62%	0.70%	4.39%
21	RWB 18 - Manatee, Sarasota	Mary Helen Kress/June 1993	Dale Vollrath	9.8%	29,341	10,823	10,243	502	53	4.90%	0.49%	3.80%
22	RWB 13 - Brevard	Lisa Rice/March 2005	Jack Rood	10.8%	28,026	12,494	8,960	372	121	4.15%	0.97%	3.36%
23	RWB 2 - Okaloosa, Walton	Linda Sumblin/October 2011	Dr. David O. Miller	7.2%	9,130	3,792	4,483	168	42	3.75%	1.11%	3.09%
24	RWB 21 - Palm Beach	Steve Craig/December 2011	Steven M. Parrish	9.7%	60,029	23,111	25,819	680	138	2.63%	0.60%	2.12%
Statewide Totals				9.90%	893,114	374,695	314,087	32,965	6,536	10.50%	1.74%	8.31%

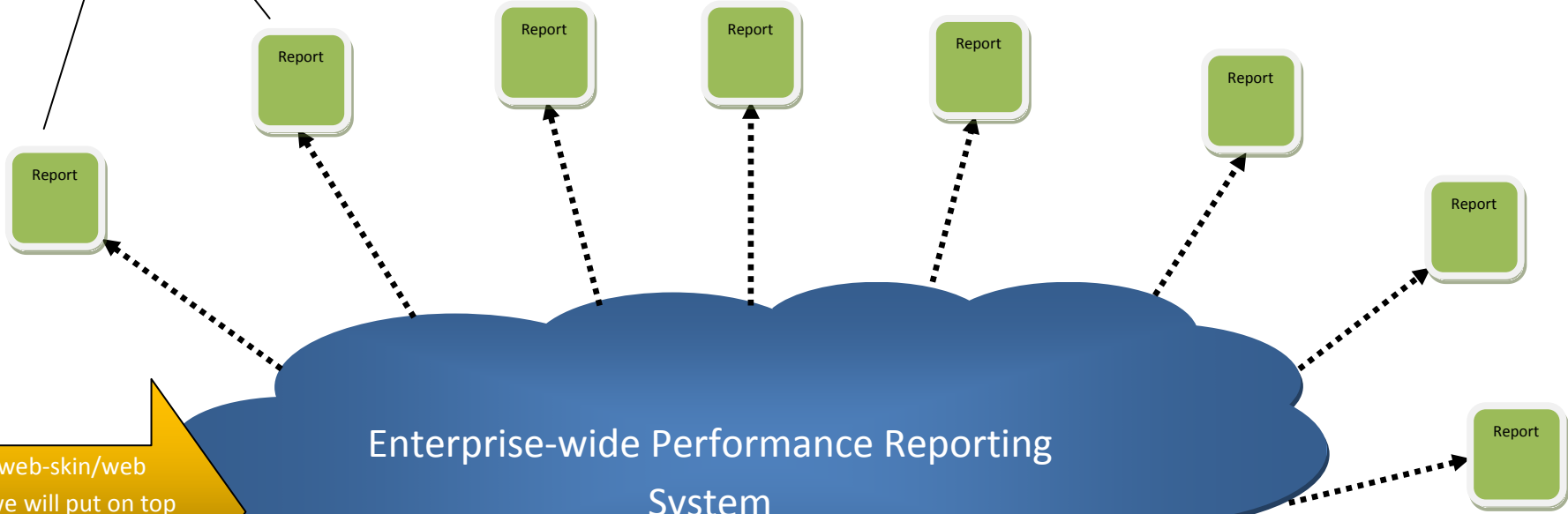
Monthly Report Data Descriptions (01/23/2012)

Column	Measure	Data Source	Definition	Calculation
A	Composite Ranking	Daily and Monthly Placement Reports	A ranking of 1-24 based on the composite score.	Numeric Rankings Based on Composite Score (Column M)
B	RWB/ Counties Served	N/A	N/A	N/A
C	Executive Director/Hire Date	N/A	N/A	N/A
D	Board Chair	Workforce Florida Inc.	N/A	N/A
E	Unemployment Rate	Labor Market Statistic Survey	Local Area Unemployment Statistics by county. - (Not Seasonally Adjusted)	Survey
F	Number of Unemployed Individuals (Includes Claimants)	Labor Market Statistic Survey	Local Area Unemployment Statistics by county. - (Not Seasonally Adjusted)	Survey
G	Number of Unemployment Compensation Claimants	Unemployment Compensation Claim Control File	The number of individuals in the UC Claim Control considered to be "active" claimants.	N/A
H	Number of Job Openings Available	Employ Florida Marketplace	The number of job openings listed in Employ Florida Marketplace on the day being reported. Note: The monthly report will reflect any job listed at anytime during the month.	N/A
I	Number of Individuals Placed in Jobs	Employ Florida Marketplace	The number of placements listed in Employ Florida Marketplace the day/ month being reported.	N/A
J	Number of Unemployment Compensation Claimants Placed into Jobs	Daily and Monthly Placement Reports Calculation	Placements in Employ Florida Marketplace that matched an SSN on the "active" claimants list.	N/A
K	Percentage of Job Openings Filled	Daily and Monthly Placement Reports Calculation	The number of placements listed in Employ Florida Marketplace compared to total openings being reported.	Column I divided by column H.
L	Percentage of Unemployment Compensation Claimants Placed into Jobs	Daily and Monthly Placement Reports Calculation	The number of UC claimants placed compared to the total number of UC claimants.	Column J divided by column G.
M	Composite Score	Daily and Monthly Placement Reports Calculation	This score is a weighed score with a .25% weight assigned to claimants and .75% weight assigned to all placements.	Column K multiplied by 3 plus column L divided by 4. [$\{k*3\}+L\}/4$
N	Monthly Ranking	Employ Florida Marketplace	Ranking based on prior month's data.	N/A
O	Month – to – Date Ranking	Employ Florida Marketplace	Ranking based on placements for month-to-date.	N/A

Daily Job Placement Report - Data for January 31, 2012

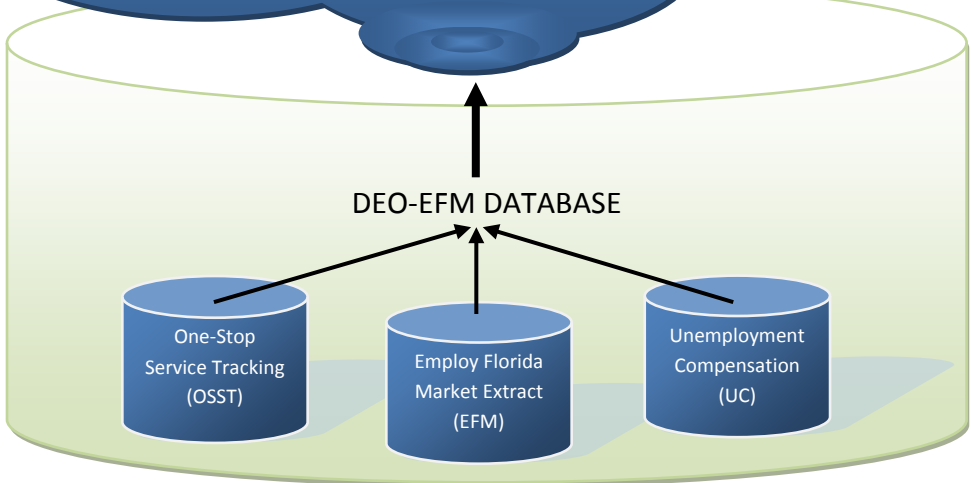
Local Monthly Factors						Daily Job Placement Report								
Daily Composite Ranking	Regional Workforce Board (RWB) - Counties Served	Executive Director/Hire Date	Board Chair	Unemployment Rate - December 2011	# of Unemployed Individuals (Includes Claimants) - December 2011	# of Unemployment Compensation Claimants On January 27, 2012	# of Job Openings Available on January 31, 2012	# of Individuals Placed in Jobs on January 31, 2012	# of Unemployment Compensation Claimants Placed into Jobs on January 31, 2012	% of Job Openings Filled = I/H	% of Unemployment Compensation Claimants Placed into Jobs = J/G	Composite Score = [(K*3) + L]/4	Monthly Ranking - December	Month-to-Date Composite Ranking
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	RWB 9 - Alachua, Bradford	Angela Pate/July 2005	Dr. Maggie Labarta	7.70%	10,890	3,671	3,469	295	29	8.50%	0.79%	6.58%	21	7
2	RWB 3 - Calhoun, Holmes, Jackson, Liberty, Washington	Richard Williams/Oct 2002	Darrin Wall	8.30%	4,236	1,745	519	19	2	3.66%	0.11%	2.77%	3	3
3	RWB 4 - Bay, Franklin, Gulf	Kimberly L. Bodine/July 1996	Gary Ross	10.00%	9,949	5,133	1,833	54	14	2.95%	0.27%	2.28%	19	8
4	RWB 6 - Hamilton, Jefferson, Lafayette, Madison, Suwannee, Taylor	Sheryl Rehberg/September 2006	J. Douglas Whitaker	9.80%	4,728	1,916	469	12	1	2.56%	0.05%	1.93%	12	13
5	RWB 16 - Hernando, Pasco	Jerome Salatino /January 2010	Lex Smith	11.60%	30,072	11,854	2,731	60	5	2.20%	0.04%	1.66%	1	2
6	RWB 23 - Miami-Dade, Monroe	Rick Beasley/August 2005	Alvin West	10.20%	137,965	59,024	21,531	402	32	1.87%	0.05%	1.41%	2	1
7	RWB 20 - Indian River, Martin, Okeechobee, St. Lucie	Richard Stetson/October 2010	Soma Gail Melnick	11.20%	29,940	14,383	3,214	58	6	1.80%	0.04%	1.36%	17	9
8	RWB 14 - Pinellas	Edward Peachey/February 2003	Dr. Tony Leisner	9.80%	43,209	18,243	8,615	150	38	1.74%	0.21%	1.36%	7	5
9	RWB 10 - Citrus, Levy, Marion	Rusty Skinner/August 1996	Suzanne Mills	11.30%	23,237	9,707	3,368	31	14	0.92%	0.14%	0.73%	16	11
10	RWB 24 - Charlotte, Collier, Glades, Hendry, Lee	Joseph Paterno/March 1997	Ken O'Leary	10.00%	50,978	18,770	10,679	97	8	0.91%	0.04%	0.69%	11	18
11	RWB 22 - Broward	Mason C. Jackson/January 1986	Gary Arenson	8.60%	84,264	37,661	16,448	124	65	0.75%	0.17%	0.61%	5	6
12	RWB 5 - Gadsden, Leon, Wakulla	Kimberly A. Moore/July 2005	Barbara Edwards	7.90%	14,689	5,774	3,347	26	4	0.78%	0.07%	0.60%	6	4
13	RWB 15 - Hillsborough	Edward Peachey/March 2010	Dennis A. Meyers	9.50%	57,168	25,441	17,685	132	23	0.75%	0.09%	0.58%	8	14
14	RWB 2 - Okaloosa, Walton	Linda Sumblin/October 2011	Dr. David O. Miller	7.20%	9,130	3,872	2,353	16	6	0.68%	0.15%	0.55%	15	23
15	RWB 12 - Lake, Orange, Osceola, Seminole, Sumter	Kevin Neal/Interim	Kevin W. Shaughnessy	9.40%	108,015	43,206	23,269	161	32	0.69%	0.07%	0.54%	22	16
16	RWB 7 - Columbia, Dixie, Gilchrist, Union	John Chastain/December 2001	Jennie M. Reed	9.60%	4,748	2,026	1,091	7	2	0.64%	0.10%	0.51%	10	10
17	RWB 13 - Brevard	Lisa Rice/March 2005	Jack Rood	10.80%	28,026	12,662	4,979	31	7	0.62%	0.06%	0.48%	18	22
18	RWB 1 - Escambia, Santa Rosa	Susan B. Nelms/July 1996	Jay Overman	9.60%	19,897	8,449	3,065	15	2	0.49%	0.02%	0.37%	4	19
19	RWB 11 - Flagler, Volusia	Rick Fraser/April 2002	John Wanamaker	10.50%	29,883	13,351	3,992	17	6	0.43%	0.04%	0.33%	14	17
20	RWB 21 - Palm Beach	Steve Craig/December 2011	Steven M. Parrish	9.70%	60,029	23,399	13,366	43	6	0.32%	0.03%	0.25%	24	24
21	RWB 8 - Baker, Clay, Duval, Nassau, Putnam, St. Johns	Bruce Ferguson/October 2003	Elaine A. Johnson	9.30%	67,124	34,869	13,523	39	17	0.29%	0.05%	0.23%	23	15
22	RWB 18 - Manatee, Sarasota	Mary Helen Kress/June 1993	Dale Vollrath	9.80%	29,341	11,023	6,227	15	2	0.24%	0.02%	0.19%	20	21
23	RWB 17 - Polk	Stacy Campbell-Domineck/September 2006	Rod Crowley	10.70%	28,742	11,728	4,589	11	0	0.24%	0.00%	0.18%	13	20
24	RWB 19 - DeSoto, Hardee, Highlands	Roger Hood/April 2005	David Royal	9.90%	6,854	2,282	3,431	2	1	0.06%	0.04%	0.05%	9	12
Statewide Totals				9.90%	893,114	380,189	173,793	1,817	322	1.05%	0.08%	0.81%		

Countless On Demand Database-Driven Reports Will Be Created



This is the web-skin/web interface we will put on top of the database

Enterprise-wide Performance Reporting System



We already have this portion in place.