

Staff Metrics in an Integrated Environment

To stabilize and maximize performance from the integrated service delivery model, it will be critical to establish a set of key performance metrics that each and every staff person can adopt as their set of operational accountabilities. Clearly, as a region, EGR-3 has a specific set of performance standards that must be met and these standards focus on customer employment, retention, and wages. However, staff metrics should focus on the day to day (and week to week) activities over which they have direct control. And if these metrics are defined properly, the use of daily and/or weekly metrics will drive staff to engage in activities that will result in improved placement, retention, and wage rates for customers. In the end, the use of appropriate metrics will help EGR-3 meet performance expectations as a region.

As these metrics are considered, a few philosophical principles should be reviewed relative to how metrics can be used in the WorkOne Northeast system:

- ***Metrics add substance to the procedures manuals*** – The procedures manuals that have been developed define many of the processes that occur with customers within the overall context of the WorkOne customer flow. However, it is possible to comply with these manuals and only provide limited services to customers. As such, metrics are needed to ensure that the defined procedures are being utilized with the vast majority of WorkOne customers.
- ***Metrics are a guide to drive desired staff behavior*** – The great thing about metrics is that they inform staff of the expected outcomes to be achieved from their daily/weekly activities. However, the use of metrics also allows staff great flexibility to define how they will achieve this result. Different customers have different needs and staff must have the flexibility to adjust their “style” and “approach” with customers to ensure success. To be sure, these flexibilities must be exercised within the context of the procedures manuals, but metrics will guide staff to deliver certain services and maintain certain levels of customer interactions to help ensure success.
- ***Metrics should include stretch goals*** – Although EGR-3 can and should establish metrics for all staff, stretch metrics should also be established to encourage staff to do more than the minimum.
- ***Reward staff based on metrics*** – Although we will need to work on this concept, it is relatively clear that if metrics are to be meaningful, they must be made meaningful through the use of an appropriate reward system. Part of this is the performance appraisal process that both the state and JobWorks use; however, there should be an effort to identify other ways to reward staff who, through hard work and personal commitment, meet and exceed key metrics.

In practical terms, EGR-3 could define staff metrics in a manner similar to the way production goals are established in a manufacturing environment. This can include production goals, specific product goals, and basic quality goals. And, as one component of our quality system, EGR-3 could adopt a workforce version of Statistical Process Control (SPC) to ensure that metrics are being accomplished. This means that the tracking of these metrics will be critical to identify WorkOne Centers or staff that are producing below the established standards. And when

this happens, RO and Center leadership can work together to ensure that appropriate assistance is provided to staff that need it.

Although there are many options for defining staff metrics, below are some thoughts on key performance concepts that could be considered for inclusion in EGR-3 staff metrics.

- **Production Goal:** Every Advisor (on all three teams) is expected to see *at least* one customer every hour that they are at work. This means that, at a minimum, every Advisor should see 8 customers per day (state contracted hourly staff may only see 5 customers per day based on their work schedule). This also means that every Advisor should record 8 (or 5) services as well as 8 (or 5) case notes in the TrackOne system. The stretch goal for this metric would be 12 customers per day, all entered into the TrackOne system. This metric will bring the concept of continuous engagement to life! The implications of this metric would be as follows:
 - Staff on the Welcome Team will see one customer per hour in the full registration process. If staff do not have a customer to assist, they will look to find other ways to help customers in the office (for example, they could work with customers in the resource room).
 - Staff on the Skills and Employment Teams will see one customer per hour in the delivery of intensive and training services. And to accomplish this, staff will begin to exercise new levels of creativity and innovation by implementing new methods of scheduling and delivering services to customers. For instance, staff will schedule customers on an at least an hourly basis, deliver services in small group settings, and will contact more customers each day to ensure that their schedule is planned and full.
 - Staff on the Skills and Employment Teams will want to see more "walk-back" referrals from the Welcome Team to immediately engage customers in activities. In other words, when a customer has completed the Welcome Team process, there would be an increased desire to see these customers immediately referred to the Skills and Employment Teams. This should increase the number of customers that experience immediate engagement with WorkOne services.
- **Production Goal:** Of the 8 customers that each Advisor sees every day, for Skills and Employment Team Advisors, of these customers will be returning customers for whom additional services are being provided. This means 4 customers per day will have their 90 day clock restarted through the delivery of appropriate services, taking the concept of continuous engagement and kicking it up one more level. The stretch goal would be 6 returning customers per day. The implications of this metric would be as follows:
 - Staff on the Skills and Employment Teams will schedule more customers for second visits/services to ensure that they meet this metric. Staff will also apply increased levels of creativity to ensure that customers are scheduled and return for services.
 - Staff on the Skills and Employment Teams will actually overbook their schedules to ensure that when customers fail to show, they have other customers to see and serve. Additionally, if an Advisor does not have a customer that they can work with, they may be more likely to visit the resource room or a computer lab to see if there is a customer that can use some assistance. This would be good customer service and, for every customer that is assisted, the 90 day clock would start anew.
 - Center-based teams will begin to dedicate the tracker (tracking function) to activities that contribute to meeting the metric. For instance, trackers will begin to more

aggressively follow up on customers that have failed to attend a workshop or appointment. If trackers are used appropriately, this will help fill staff calendars with customer activities.

- ***Specific Product Goal:*** For every Advisor, 50% of the customers assigned to them in TrackOne should receive at least one skill development service (workshop, computer training, OJT, referral to area post-secondary schools, customized training, basic skills training, others). The stretch goal would be 60% of customers receiving skill development services. The implications of this metric would be as follows:
 - If staff on the Skills and Employment Teams are not available to see a customer on an immediate basis, Welcome Team staff will be more likely to schedule the customer for a workshop or computer training class (along with an appointment) to help accomplish the metric.
 - Staff on the Skills and Employment Team will begin scheduling increased numbers of customers for skill development activities and reporting these activities in the TrackOne system. The result of all these referrals should be a WorkOne customer base with improved skills (that will better meet employer needs).
 - Staff on the Skills and Employment Team will begin to identify a need for additional skill development products based upon the skill deficiencies of the customers they are serving. For instance, if staff are seeing a large number of ethnic customers with language barriers, there would be a “cry” for language development classes to address this need. This will help to more closely align product development efforts with customer needs.

- ***Specific Product Goal:*** Every Advisor will provide job lead information to at least 4 appropriate customers per day. This can be done through face-to-face activities, over the phone, or through email for those customers that prefer this form of communication. Whatever the method that is used, however, the provision of these job leads will need to be reflected in the TrackOne system as services provided to customers. The stretch goal would be 6 customers per day receiving job leads. The implications of this metric would be as follows:
 - The ultimate performance of the WorkOne system is measured, at least in part, by the number of customers that find employment. And the provision of job leads to customers on a regular basis will aid in this process. This metric will require all Advisors to stay in touch with current employment opportunities, to begin looking for customers that match the requirements for these opportunities, and for communicating these opportunities to customers. This metric will also encourage staff to be innovative in finding ways to get job leads to customers (for instance, finding several customers that have common job goals and doing an e-job search for these customers, sharing the results of the effort in a group activity).
 - When the Employer Services Team identifies an employer with a hiring need and communicates this fact to center-based staff, Advisors will pay greater attention to these job leads and look to aggressively share these leads with appropriate customers. This will help ensure that both job seeking and employer customers get the support they need.
 - By providing increased numbers of job leads to WorkOne customers, Advisors will be able to record these services in TrackOne and start the 90 day clock over for these customers.

- **Specific Product Goal:** For every Advisor, 33% of the customers they serve (as identified in TrackOne) should receive a referral to a WorkKeys assessment activity. The stretch goal would be 50% of customers receiving a WorkKeys referral. The implications of this metric would be as follows:
 - This metric will encourage all Advisors to schedule appropriate customers for WorkKeys assessment activities, addressing the Board's desire to see an increase in the overall number of WorkKeys assessments in EGR-3.
 - Each time that a customer is referred to a WorkKeys assessment activity, the 90 day clock will start over for that customer. This will aid the Advisor in their attempts to continuously engage customer in WorkOne activities.
 - Each time that a customer is referred to a WorkKeys assessment activity, the Advisor will have a better understanding of any skills deficiencies that their customers may possess. This enhanced understanding could very well result in an increased usage of KeyTrain to address these deficiencies. This would be very good for customers; however, it will also assist in the continuous engagement process with these customers.

- **Quality Goal:** To minimize the number of unplanned and unknown soft exits, each Advisor will ensure that 75% of their customers receive a second WorkOne service within 90 days of registration (as reported in TrackOne). 50% of all customers will receive three or more services within 90 days of registration as reported in TrackOne. The stretch goals would be 80% to receive a second service and 60% to receive three or more services. The implications of this metric would be as follows:
 - Staff on the Skills and Employment Team would begin to more aggressively schedule their customers for return visits and additional services. This will help drive the customer service concept that no customer should ever leave a WorkOne without a next service being planned and scheduled.
 - As noted earlier, center-based teams will begin to dedicate the tracker (tracking function) to activities that contribute to meeting this metric. For instance, trackers will begin to more aggressively follow up on customers that have failed to attend a workshop or appointment to ensure that they return for a second and third visit and service. This will help ensure the re-engagement of customers that might otherwise have been lost.

- **Quality Goal:** To ensure that appropriate TrackOne work is done, each Advisor will enter all information into TrackOne on a real-time basis with an error rate of 5% or less. The stretch goal would be an error rate of 3% or less. The implications of this metric would be as follows:
 - All staff will have a vested interest in mastering TrackOne screens and in completing TrackOne work on a more accurate and timely basis. This could lead to staff asking more questions and seeking more guidance about TrackOne and its various data fields to prevent errors from ever occurring.

In addition to individual staff metrics, there are also additional team/center goals that need to be established to drive other desirable behaviors into the WorkOne system. Such team/center goals could include:

- **Job Referral Goal:** To ensure that the WorkOne system is responding to employer job openings as communicated by the Employer Services Team, center-based teams will be expected to produce three quality customer referrals for every job opening that is communicated. This will ensure that employers get good candidates to review. It will also ensure that job information is shared by center staff with appropriate customers and that job referrals are made (starting the 90 clock over for these customers). In the end, then, this is a continuous engagement strategy for both employers and job seekers.
- **TAA/REA/Veterans Dual Enrollment Goals:** The idea behind this metric is that all customers from these three programs must be provided with WorkOne services in a manner that is consistent with the integrated model. In simple terms, this means that these customers must be dual enrolled in the WIA Adult services, ensuring their access to the full range of WorkOne services. Use of this metric will help to break down the programmatic silos that still exist within our team structure and ensure that customers in these silos gain access to the broader range of available WorkOne services. The specific goals for this metric are that 100% of TAA and Veterans customers must be dual enrolled into WIA Adult services and 50% of all REA customers must be dual enrolled.

Summary of Staff Metrics Being Proposed for Consideration

Proposed Metric	Performance Goal	Stretch Goal
Customers Seen Per Day	8 customers per day	12 customers per day
Return Customers Seen Per Day	4 customers per day	6 customers per day
Customers in Skill Development	50% of all customers	60% of all customers
Customers Provided with Job Leads	4 customers per day	6 customers per day
Customers Referred to WorkKeys	33% of all customers	50% of all customers
Customers with Second Services	75% of all customers	80% of all customers
Customers with 3+ Services	50% of all customers	60% of all customers
TrackOne Data Entry Accuracy	> 5% error rate	> 3% error rate
Job Referrals to Job Orders	3 referrals per job	
Customer Dual Enrollment	100% of TAA and Veterans customers	
	50% of REA customers	

Typical Advisor Daily Workload to Meet Metrics

Example #1 (Meet Metrics)	Example #2 (Stretch Goals)
4 New Customers for Immediate Engagement	6 New Customers for Immediate Engagement
4 Returning Customers for Continuous Engagement	6 Returning Customers for Continuous Engagement
4 Job Leads/Referrals of Customers to Jobs	6 Job Leads/Referrals of Customers to Jobs
Total of 12 Customer Contacts/Services	Total of 18 Customer Contacts/Services