

Workforce Investment Board of Merced County
Quality Assurance Committee
Dept of Workforce Investment (Large Conference Room)
1880 W. Wardrobe Ave, Merced, CA
September 24, 2004, 7:30-9:00 a.m.
Meeting Agenda



www.co.merced.ca.us/wi/wib/wib.html

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1. Call to Order and Roll Call
 2. Approval of Agenda
 3. Approval of Minutes (August 27, 2004)
 4. Public Opportunity to Speak
 5. Information/Discussion
 - a. Worknet Recertification Timeline and Criteria
 - b. Worknet Employment Resource Center Management Tools
 - 1) Worknet Customer Service Data for August 2004 Robin Keezer
 - c. Monitoring Summary for January 04-July 04 Elaine Craig
 6. Action Agenda
 - a. Workforce Investment Board Strategic Scorecard Joanne Presnell
 7. Chair Comments
 8. Next Meeting Date/Time –October 29, 2004, 7:30–9:00 a.m.
 9. Adjourn.....

Workforce Investment Board of Merced County
Quality Assurance Committee
Dept of Workforce Investment Large Conference Room
1880 W. Wardrobe Ave, Merced, CA
August 27, 2004, 7:30–9:00 a.m.
Workgroup Meeting Notes



Members Present: Albert Montejano (Chair), Carole Roberds (Vice Chair), Terry Nichols, Steve Tinetti

Members Absent: Ernie Flores, Jeremiah Greggains, Brian Griffin, Ned Miller

Staff Present: Dave Davis, Dee Knight, Joanne Presnell

Others Present: Karyn Wiens, Merced College

1. Call to Order and Roll Call: At 7:45.m., the Chair noted the regular meeting would be canceled due to lack of a quorum. The Chair convened a workgroup to discuss the agenda items.

2. Information/Discussion:

a. Worknet Leadership Team Update on Business Results (Category 7): Ms. Karyn Wiens provided handouts and gave an update on the progress of the Business Results Workgroup. The workgroup's focus is to 1) Improve awareness of the One-Stop to customers, and 2) Improve awareness of the One-Stop to employers. The following has been done to improve this awareness:

- Mailed out over 1500 "Did You Know" postcards to employers and an insert will go into the Chambers of Commerce Journals.
- Created a Partner Services brochure to be placed in the brochure racks at County Admin and City Hall Civic Center along with the Worknet brochures.
- Verbiage in the Marketing Plan is to be added to reflect the Customer Satisfaction Survey as a method to evaluate marketing effectiveness. It has been submitted to the Program Planning and Development Committee for approval and recommendation to the full Workforce Investment Board.

The next meeting of the Business Results Workgroup is September 13, 2004, at 8:00 a.m., in Bob Harte Square Main Street Cafe.

b. Worknet Employment Resource Center Management Tools:

1) Worknet Customer Service Data for July 2004: It was noted the ratings had gone up for Customer Satisfaction. Since the radio ad response rate was low, is it cost effective to use this method? Staff would ask Marketing for this information.

2) Workforce Investment Act Summary for PY 2003/2004 – Participant Characteristics Summary: No comments.

c. 2003-2004 Performance Measures Negotiations: Staff noted that as of March 31, 2004, the Department has exceeded the 80% required by the state, but some areas are not measured until 6-9 months after the customer has exited the program.

3. Action Agenda:

a. Workforce Investment Board Strategic Scorecard: The Chair noted he would like members to review each category of the Strategic Scorecard before presenting to the Workforce Investment Board

Executive Committee, specifically noting if the Metrics are measurable, and the Responsible WIB Committee assignment is appropriate.

1) Customer Perspective – Item 1.a. Method, Business Services would develop and implement the face-to-face survey for employers.

2) Customer Perspective – Item 2.b. Change spacing in Metrics, Method, How Often Review and Responsible WIB Committee to correspond with the “Input from Customers ...” line.

3) Customer Perspective – Item 3. Metric, after “# of Face-to-Face ...”, add Compare to Prior Year.

4) Internal Operations/Organizational Effectiveness – Item 1.b., bullet 3, Metric, change to Acceptable Progress Based on Contract Timeline for Out-of-School Youth and Younger Youth.

5) Internal Operations/Organizational Effectiveness – Item 1.c., bullet 1, Metric and Method, staff will reword and e-mail to the Chair and members for review and approval. The Responsible Committee will be PP/D.

6) Learning and Innovation – Item 1. Metric, staff has developed a scheduled timeline to present to the Worknet Leadership Team.

7) Learning and Innovation – Item 2.b. Method, add Rapid Response for Jobs Lost.

8) Learning and Innovation – Item 2.c. Metric, this will be received from City/County Building Departments.

4. Chair Comments: None.

5. Next Regular Meeting Date & Time: September 24, 2004, 7:30 a.m., Dept of Workforce Investment Large Conference Room, 1880 W. Wardrobe Ave, Merced.

6. Adjourn: The Workgroup meeting adjourned at 9:03 a .m.

Minutes prepared by Dee Knight.

TO: WIB Quality Assurance Committee

DATE: 09/24/04

FROM: WIB Staff

For Action

For Information

For Discussion

SUBJECT: Worknet Recertification

PROPOSED MOTION(S): Information/Discussion Only

DISCUSSION: The Recertification of the Worknet Employment Resource Center is from November 2003 through September 2005. The timeline, criteria and score for recertification should be reviewed and discussed, so that the Worknet Leadership Team can be apprised of what they will be working with and plan to prepare accordingly.

ATTACHMENT(S):

Recertification Timeline

Policy for Recertification

MCWIB Challenge Award Criteria

Worknet Recertification

Worknet Leadership Team

Mar 10, 2005	Select Writing Team/Begin Application
Jun 10, 2005	Draft Application Completed
Jun 30, 2005	Final Application Completed, Signed, Copied and Bound
Jul 12, 2005	Application Disbursed to Worknet Leadership Team
	All Worknet Staff Will Become Familiar with Application
Jul 15, 2005	Submit Application to WIB Examiners
Sep 2005	Prepare for Site Visit

WIB Examiners

Oct 2004	Set Recertification Score, Select Length of Recertification
Feb 2005	Select WIB Examiners
Jun 2005	Train WIB Examiners
Jul 15, 2005	Examiners Begin Independent Review
Aug 12, 2005	Independent Review Completed/Provide to Staff to Compile Results
Sep 6, 2005	WIB Examiners Consensus Meeting/Identify Site Visit Issues and Prepare Site Visit Questions
Sep 19, 2005	Site Visit Questions to Examiners for the
Sep 28, 2005	Worknet Site Visit
Oct 21, 2005	Evaluation Complete
Oct 31, 2005	Recommendation approved by QA and Executive Committees

Merced County Workforce Investment Board One-Stop Certification Process

PURPOSE

To describe the framework for Merced County Workforce Investment Board (MCWIB) to use for certification of the local One-Stop Centers for program years (2002-2004) in Merced County. This framework includes an application process customized by the MCWIB using the California Awards for Performance Excellence Challenge Award process in preparation for a continuous improvement model that uses the Malcolm Baldrige Criteria for performance excellence as a guideline for improvement. The Baldrige Criteria is a list of mandatory organizational behavior criteria that must be addressed in a certified Merced County One-Stop center. This policy is intended to give the MCWIB a process to collect and use information to assure a minimum standardized level of services at each One-Stop Center for program years (2002-2004) of operation and to establish the foundation for future certifications.

REFERENCES

P.L. 105-220, Workforce Investment Act, Section 111, (d) (2).
Department of Labor, Employment and Training Administration, 20 CFR Part 652, et al.,
Workforce Investment Act, Final Rule, August 11, 2000.

POLICY STATEMENT

The Merced County Workforce Investment Board is charged with the development and continuous improvement of a countywide workforce investment system of activities carried out through a One-Stop delivery system.

The principles articulate that Merced County's workforce strategy will be based on the Malcolm Baldrige Criteria for Performance Excellence, with a focus on continuous improvement. The Baldrige Criteria are nationally recognized as being instrumental in stimulating improvements in competitiveness and business performance. Baldrige formulates a framework of intensive self-examination and assessment in seven categories of organizational behavior displayed by the local workforce system. Those categories are:

- Leadership
- Strategic Planning
- Customer and Market Focus
- Information and Analysis
- Human Resource Focus
- Process Management
- Business Results

The Malcolm Baldrige Criteria for Performance Excellence are the basis for certifying local One-Stop workforce system centers in Merced County. The Baldrige Criteria

ensure that certification equals quality and are also the basis for continuous improvement, organizational self-assessments, and effects incentive awards. The MCWIB will evaluate the self-assessment process completed by the One-Stop Centers. The California Awards for Performance Excellence Challenge Award Process has been tailored by the MCWIB for this purpose, which is called MCWIB Challenger Award Process, and will be used to accomplish this. (**Attachment B**).

The MCWIB will have the responsibility of ensuring that the Baldrige criteria are integral to the culture of the local one-stop system and granting a certification that good for two years. The MCWIB examination team, in addition to collecting a written application and materials during the certification process, will make an on-site visit to the One-Stop Center to clarify and verify information in the application and to ensure that all core services are provided in accordance with Section 1349d)(2) of the WIA. This will be done prior to finalizing the certification score.

To be a certified One-Stop Center, including a conditional certification, each One-Stop Center must meet the minimum level of requirements as outlined in the checklist in **Attachment A**. Although each One-Stop Center will be different, including different partners, staffing patterns, a different customer base, different goals and directives, there will be a minimum level of services that must be common to each certified comprehensive (full service) center and affiliated sites as prescribed by the Merced County Workforce Investment Board. For subsequent certification of One-Stop Centers, MCWIB must consider performance outcomes, including customer satisfaction, and incorporate continuous improvement on the Baldrige criteria. Not meeting MCWIB required performance outcomes, including customer satisfaction measures, and continuous improvement measures on the Baldrige criteria, will be the basis for de-certification. Comprehensive, affiliate sites, and any partner One-Stop Centers must be linked into a local workforce area system with all serving as access points.

Re-certification will be required every two years. The re-certification process will be similar to this process and will emphasize performance outcomes, quality and continuous improvement based on the Baldrige Criteria for Performance Excellence. For each subsequent re-certification, 100% of the statutory requirements must be met, and there must be an increase in the score on the Challenger Application.

There will be two parts to the Certification Process with a separate scoring method for each. One part will demonstrate that the One-Stop Center has met the statutory requirements by providing the necessary services as outlined in the WIA. The other will assess the degree of progress in Performance Excellence and Continuous Improvement within the One-Stop organizational culture.

A minimum score of 100% is needed for the statutory requirements in **Attachment A**. These requirements must be met at a 100% level, or a conditional certification will be given with six months for corrective action to remedy the deficiency.

A minimum score of 300 or 30% is required using the MCWIB Challenger Award Process (Attachment B). If the minimum score isn't met, a conditional certification will be granted and the applicant will have six months to reapply.

For a certification to be granted by the MCWIB a score of 100% is needed for the Statutory Criteria, in addition, a minimum score of 300 or 30% is required on the MCWIB Challenger Award Process.

ATTACHMENT A:

I. Comprehensive (Full Service) One-Stop Centers

**Statutory Based Criteria for All Comprehensive, physical one-stops,
To be certified:**

A. Must provide all core services listed in the Workforce Investment Act, as described in Section 134(d)(2) of the Act.

- 1. Determination of whether individuals are eligible to receive assistance.**
- 2. Outreach, intake, and orientation to the information and other services available.**
- 3. Initial assessment of skill levels, aptitudes, abilities, and supportive service needs.**
- 4. Job search placement and assistance, and where appropriate, career counseling.**
- 5. Employment statistics information for local, regional and national labor market areas including job vacancy listings, information on job skills necessary to obtain the jobs described in the clause and local information relating to local occupations in demand and the earnings and skill requirements for such occupations.**
- 6. Provision of performance information and program cost information on eligible providers of training services.**
- 7. Provision of information regarding how the local area is performing on the local performance measures.**

- 8. Provision of accurate information relating to the availability of supportive services, including childcare and transportation, available in the local area.**
 - 9. Information regarding filing claims for unemployment compensation.**
 - 10. Assistance in establishing eligibility for welfare-to-work; and programs of financial aid assistance for training and education programs.**
 - 11. Follow-up services, including counseling regarding the workplace, for participants in the workforce investment activities who are placed in unsubsidized employed, for not less than 12 months .**
- B. Must provide access to intensive services. Must also provide access to training and serve as a point of access for Individual Training Accounts (ITAs).**
- C. Must provide access to all labor exchange services authorized under the Wagner-Peyser Act.**
- D. Must provide the core services and access to all of the workforce programs and activities carried out by mandated one-stop partners.**
- E. Additional Criteria for all Comprehensive One-Stop Centers to be certified include:**
- 1. High speed computer access to Internet based information system.**
 - 2. Access to computers, including printing, access to software programs, which could include word processing, programs for resume development, and job application and cover letter preparation.**
 - 3. Access to telephones and fax for job search.**
 - 4. Access to up-to-date career and local community resource information.**
 - 5. Strategies to meet any demand for “non-traditional” hours of operation for those who cannot attend during the traditional 8 AM - 5 PM hours of operation.**

6. Information desk and/or resource areas are staffed.
7. There is a presence of mandated partners on-site.
8. A case management system exists that provides guidance for customers participating in intensive and training services.
9. MOUs or operational agreements are in place between partners for daily operations.
10. Information sharing and customer confidentiality agreements exist.
11. A description of all employer services is included in the business plan, including strategies for making the information available to employers.
12. A customer assessment process exists, including skill, aptitude, interest, and needs assessment.
13. Has an established referral process that is customer focused.
14. Meets a minimum score of 300 or 30%, using the MCWIB Challenger Award Process.

II. Affiliated One-Stop Centers' Requirements for Certification

A. Affiliated Sites

Statutory Based Criteria for All Affiliated Sites of the Merced County One-Stop System:

1. Must provide one or more of the programs, services or activities of the mandated partners.
2. Must be part of a "network" of mandatory and other partners.

Additional Criteria for All Affiliated One-Stop Sites:

1. Must possess high speed computer access to Internet based information system.
2. Must provide access to local community resource information.

3. **A case management system exists that provides guidance for customers of the affiliate site.**
4. **A MOU or other written agreement exists with the LWIB.**
5. **Information sharing and referral strategies agreements exist.**
6. **A description of all customer services is made available to the local workforce system.**
7. **Must provide target customer base core services and access to other services by target population(s) as part of a “systems” approach to local workforce service delivery.**
8. **Willingness to participate in the LWIA performance system.**
9. **Willingness to provide appropriate resources to the local workforce system and serve as an entry point.**
10. **Meets a minimum score of ___ or ___%, using the MCWIB Challenger Award Process.**

B. Partner Sites

Statutory Based Criteria for all Partner Sites of the Merced County One-Stop System:

1. **Must be part of a “network” of one-stop partners through which the partners provide services that are linked to an affiliated site and through which all individuals can access information on the availability of the partners’ core services offered in the local workforce area.**
2. **A required partner’s core services that are appropriate for its customer population must be made available at a comprehensive center, and additional sites, as appropriate.**
3. **Must provide target customer core services and access to other services by target population(s) as part of a “systems” approach to local workforce service delivery.**

Additional Criteria for All Partner Sites of the Merced County One-Stop Center System:

- 1. Must possess high speed computer access to Internet based information system.**
- 2. Must provide access to local community resource information.**
- 3. A case management system exists that provides guidance for customers of the partner site.**
- 4. A MOU or other written agreement exists with the LWIB.**
- 5. Information sharing and referral strategies agreements exist.**
- 6. A description of all customer services is made available to the local workforce system.**
- 7. Willingness to participate in the LWIA performance system.**
- 8. Willingness to provide appropriate resources to the local workforce system.**
- 9. Must serve as an entry point to the local workforce system.**
- 10. Meets a minimum score of ___ or ___%, using the MCWIB Challenger Award Process.**

The Merced County Workforce Investment Board

Challenger Award
2002-2003 Application
For One-Stop Certification



**WORKFORCE
INVESTMENT BOARD
MERCED COUNTY**

THE CHALLENGER AWARD PROCESS

As adopted by The Merced County Workforce Investment Board

Congratulations on taking the first step to becoming a best-in-class organization

About the Challenger Award

The Challenger is a self-assessment recognition program designed and administered by the Merced County Workforce Investment Board. Our primary objective is to help your organization understand its strengths and opportunities for improvement as defined by the 2002 criteria of the Malcolm Baldrige National Quality Award program.

The Challenger Award Process criteria consist of an “Organizational Profile” plus seven major “Categories” that are common to all private and public sector organizations. These seven categories are derived from the Malcolm Baldrige National Quality Award criteria. They are:

1. **Leadership**
2. **Strategic Planning**
3. **Customer and Market Focus**
4. **Information and Analysis**
5. **Human Resource Focus**
6. **Process Management**
7. **Business Results**

The Benefits of Participating

The One-Stop Centers that apply for the Challenger Award will realize many important benefits. They include:

- A thorough self-assessment of your strengths and opportunities for improvement based on the 2002 criteria from the Malcolm Baldrige National Quality Award. There is no higher standard for performance excellence than the Baldrige Award.
- Use of the Merced County Workforce Investment Board (MCWIB) logo at your One-Stop stating that your One-Stop is “Certified” by the MCWIB.
- Increased opportunities for customer loyalty by demonstrating your commitment to excellence and quality service.
- Accelerated change, growth, and improvement throughout your organization.
- The opportunity for your people to be part of the solution through their participation on process improvement teams.

How To Apply?

Each One-Stop applicant of the Challenger must complete the **Intent to Apply** form and return it to the MCWIB. The intent to

Apply form requires the support of the applicant's One-Stop Steering Committee.

The purpose of completing your **Intent to Apply** form is to allow the MCWIB to assemble an Examiner Team that will review your application.

THE CHALLENGER AWARD PROCESS

How to Proceed with your Challenger Application:

We recommend a three-step process to ensure your organization receives the maximum benefit of completing this important process.

Step One. A Meeting Among Senior Management

The One-Stop Steering Committee should gather its senior managers together to devise a strategy to complete the self-assessment exercise.

At this meeting, each of the seven categories should be assigned to one or more key employees. This includes the Leadership category.

Also, a separate Application Writing Team should be formed with enough members to organize the thoughts and findings of the seven category teams. The Application Writing Team should also write the Organizational Profile.

Each team should meet regularly until it has completed its assignment and responded thoroughly to each question herein. It is essential to hold each team to a predetermined deadline.

Step Two: The Draft Report

When each of the seven category teams has completed its work, the Application Writing Team swings into action. The Application Writing Team begins the task of assembling the various findings of each category team and creating a succinct report within the limited number of pages per category.

Step Three: Consensus Meeting

When the Application Writing Team has completed its assignment, the One-Stop Steering Committee should gather the entire team together for a comprehensive Consensus Meeting (this could take up to eight hours to complete).

Your Written response should be distributed at least five days prior to the meeting to allow each member enough time to read and critique it. *The purpose of this meeting is to reach consensus on the application of the report not to achieve a unanimous decision.* Therefore, both strengths and opportunities for improvement of the organization listed in the response are appropriate and encouraging. Remember, that you are preparing a response for the MCWIB Examiner Team to review.

The primary purpose of the MCWIB Examiner Team is to help you improve your performance. Resist the temptation to “sugar-coat” your organization’s weaknesses. It might help to know that most Baldrige Award winning companies rarely score above the 60% range in these seven categories.

When consensus is reached in all seven categories, each member of your team is encouraged to sign your Challenger response before it is mailed to the MCWIB.

**Examination Team
Review and Feedback
Report and Scoring
System**

Upon receipt of your completed Challenger application, the MCWIB Examiner Team will thoroughly review your responses, make an on-site visit/s, and prepare a written Feedback Report. This process will take approximately four to six weeks. The Feedback Report will include strengths and opportunities for improvement, and specific recommendations that your organization may consider for further action.

Each One-Stop applicant of the Challenger who successfully completes this process with a minimum score of 75, and meets a 100% of the statutory requirements will be formally recognized as a certified One-Stop Center.

Re-certification will be required each calendar year. The re-certification process will be similar to this process and will emphasize performance outcomes, quality and continuous improvement based on the Baldrige Criteria for Performance Excellence. Each subsequent year for re-certification, 100% of the statutory requirements must be met, and there must be an increase of a minimum of 50 points on the Challenger Application.

2002 MCWIB Criteria for The Challenger Award Category, Item and Points Listing

Preface: Organizational Profile

- P.1 Organizational Description
- P.2 Organizational Challenges

2002 Categories/Items	Point Values
1 Leadership	120
1.1 Organizational Leadership	80
2.2 Public Responsibility	40
2 Strategic Planning	85
2.1 Strategy Development	40
2.2 Strategy Deployment	45
3 Customer and Market Focus	85
3.1 Customer and Market Knowledge	40
3.2 Customer Relationships and Satisfaction	45
4 Information and Analysis	90
4.1 Measurement and Analysis of Organizational Performance	50
4.2 Information Management	40
5 Human Resource Focus	85
5.1 Work Systems	35
5.2 Employee Education, Training, and Development	25
5.3 Employee Well-Being and Satisfaction	25
6 Process Management	85
6.1 Product and Services Processes	45
6.2 Business Processes	25
6.3 Support Processes	15
7 Business Results	450
7.1 Customer Focused Results	125
7.2 Financial and Market Results	125
7.3 Human Resources Results	80
7.4 Organizational Effectiveness Results	120
TOTAL POINTS	1000

Score	Approach-Deployment
0%	<ul style="list-style-type: none"> No Systematic approach is evident, information is anecdotal
10% to 20%	<ul style="list-style-type: none"> The beginning of systematic approach to the basic purposes of the Item is evident. Major Gaps exist in deployment that would inhibit progress in achieving the basic purpose of the Item. Early stages of transition from reacting to problems to a general improvement orientation are evident.
30% to 40%	<ul style="list-style-type: none"> An effective, systematic approach, responsive to the basic purposes of the Item, is evident. The approach is deployed, although some areas or work units are in early stages of deployment. The beginning of a systematic approach to evaluation and improvement of basic Item processes is evident.
50% to 60%	<ul style="list-style-type: none"> An effective, systematic approach, responsive to the overall purposes of the Item and your key business requirements, is evident. The approach is well deployed, although deployment may vary in some areas or work units. A fact-based, systematic evaluation and improvement process is in place for improving the efficiency and effectiveness of key processes. The approach is aligned with your basic organizational needs identified in the other Criteria Categories.
70% to 80%	<ul style="list-style-type: none"> An effective, systematic approach, responsive to the multiple requirements of the Item and your current and changing business needs, is evident. The approach is well deployed, with no significant gaps. A fact-based, systematic evaluation and improvement process and organizational learning/sharing are key management tools; there is clear evidence of refinement and improved integration as a result of organizational-level analysis and sharing. The approach is well integrated with your organizational needs identified in the other Criteria Categories.
90% to 100%	<ul style="list-style-type: none"> An effective, systematic approach, fully responsive to all the requirements of the Item and all your current and changing business needs, is evident. The approach is fully deployed without significant weaknesses or gaps in any areas or work units. A very strong fact-based, systematic evaluation and improvement process and extensive organizational learning/sharing, are key management tool; strong refinement and integration, backed by excellent organizational-level analysis and sharing, are evident. The approach is fully integrated with your organizational needs identified in the other Criteria Categories

Score	Results
0%	<ul style="list-style-type: none"> • There are no results or poor results in areas reported.
10% to 20%	<ul style="list-style-type: none"> • There are some improvements and/or early good performance levels in a few areas. • Results are not reported for many to most areas of importance to your organization's key business requirements.
30% to 40%	<ul style="list-style-type: none"> • Improvements and/or good performance levels are reported in many areas of importance to your organization's key business requirements. • Early stages of developing trend and obtaining comparative information are evident. • Results are reported for many to most areas of importance to your organization's key business requirements.
50% to 60%	<ul style="list-style-type: none"> • Improvement trends and/or good performance levels are reported for most areas of importance to your organization's key business requirements. • No pattern of adverse trends and no poor performance levels are evident in areas of importance to your organization's key business requirements. • Some trends and/or current performance levels-evaluated against relevant comparisons and/or benchmarks-show areas of strength and/or good to very good relative performance levels. • Business results address most key customer, market , and process requirements.
70% to 80%	<ul style="list-style-type: none"> • Current performance is good to excellent in areas of importance to your organization's key business requirements. • Most improvement trends and/or current performance levels are sustained. • Many to most trends and/or current performance levels-evaluated against relevant comparisons and/or benchmarks-show areas of leadership and very good relative performance levels. • Business results address most key customer market, process and action plan requirements.
90% to 100%	<ul style="list-style-type: none"> • Current performance is excellent in most areas of importance to your organization's key business requirements. • Excellent improvement trends and/or sustained excellent performance levels are reported in most areas. • Evidence of industry and benchmark leadership is demonstrated in many areas. • Business results fully address key customer, market, process, and action plan requirements.

The Challenger Process

The First Stage for Certification of the One-Stop Centers

Preface: Organizational Profile

The Organizational Profile (formerly known as the Business Overview) is an outline of the applicant's business, addressing what is most important to the business, key influences on how the business operates, and where the business is headed. *The Organizational Profile is intended to help MCWIB Examiners understand what is relevant and important to the One-Stop Centers business.*

The Organizational Profile is of critical importance to the applicant because:

- It is the most appropriate starting point for writing and reviewing the application, helping to ensure focus on key business issues and consistency in responses, especially in reporting results; and
- It is used by the MCWIB Examiners in all stages of application review.

Guidelines for Preparing the Organizational Profile:

The *Organizational Profile* is a snapshot of your organization, the key influences on how you operate, and the key challenges you face.

P.1 Organizational Description

Describe your organization's business environment and your key relationships with customers, suppliers, and other partners.

Within your response, include answers to the following questions;

a. Organizational Environment

- What are your organization's main products and/or services? Include a description on how they are delivered to customers.
- What is your organizational context/culture? Include your purpose, vision, mission, and values, as appropriate.
- What is your employee profile? Include educational levels, workforce and job diversity, bargaining units, use of contract employees, and special safety requirements, as appropriate.
- What are your major technologies, equipment, and facilities?
- What is the regulatory environment under which your organization operates? Include occupational health and safety regulations; accreditation requirements; and environmental, financial, and product regulations.

b. Organizational Relationships

- What are your key customer groups and/or market segments? What are their key requirements for your products and services? Include how these requirements differ among customer groups and/or market segments, as appropriate.
- What are your most important types of suppliers and dealers and your most important supply chain requirements? What are your key supplier and customer partnering relationships and communication mechanisms?

P.2 Organizational Challenges

Describe your organization's competitive environment, your key strategic challenges, and your system for performance improvement.

Within your response, include answers to the following questions:

a. Competitive Environment

- What is your competitive position? Include your relative size and growth in your industry and the numbers and types of competitors.
- What are the principal factors that determine your success relative to your competitors? Include any changes taking place that affect your competitive situation.

b. Strategic Challenges

- What are your key strategic challenges? Include operational, human resource, business, and global challenges, as appropriate.

c. Performance Improvement System

- How do you maintain an organizational focus on performance improvement? Include your approach to systematic evaluation and improvement of key processes and to fostering organizational learning and knowledge sharing.

Importance of Your Organizational Profile

- It is the most appropriate starting point for self-assessment and for writing an application;
- It helps you identify potential gaps in key information and focus on key performance requirements and business results;
- It is used by the Examiners in all stages of application review, to understand your organization and what you consider important; and
- It also may be used by itself for an initial self-assessment. If you identify topics for which conflicting, little, or no information is available, it is possible that your assessment need go no further and you can use these topics for action planning.

Page Limits

The Organizational Profile should be limited to five (5) pages. This section is not counted in the overall application page limit of 12 pages.

The Seven Categories of Performance Excellence:

Directions:

Using a maximum of twelve (12) pages for this section, please respond to the following seven categories. Please focus on your “Approach” and “Deployment” of each Category.

Typically, applicants will devote 1-1/2 pages per Category response in Categories 1-6. Category 7, Business Results, will require several pages in your response.

Please note that it is *not* necessary to discuss specific “Results” in Categories 1-6 since all “Results” can be listed in Category 7, Business Results. You should plan to use 3-4 pages to discuss your Results in Category 7.

1. Leadership 120

The *Leadership* Category examines how your organization’s senior leaders address values, directions, and performance expectations, as well as a focus on customers and other stakeholders, empowerment, innovation, and learning. Also examined is how your organization addresses its responsibilities to the public and supports its key communities.

Issues to Address in Your Challenger Application:

- 80 a. Describe how your senior leaders guide your organization and how they review organizational performance.
- 40 b. Summarize how your organization addresses its responsibilities to the public and practices good citizenship.

2. Strategic Planning 85

The *Strategic Planning* Category examines how your organization develops strategic objectives and action plans. Also examined are how your chosen strategic objectives and action plans are deployed and how progress is measured.

Issues to Address in your Challenger Application:

- 20 a. Summarize briefly your organization’s strategic plan.
- 20 b. Summarize how your organization established its strategic objectives.
- 45 c. Tell how your organization converts its strategic objectives into action plans.

3. Customer and Market Focus 85

The *Customer and Market Focus* Category examines how your organization determines requirements, expectations, and preferences of customers and markets. Also examined is how your organization builds relationships with customers and determines the key factors that lead to customer acquisition, satisfaction, and retention; and, to business expansion.

Issues to Address in your Challenger Award Application:

- 40 a. Describe how your organization determines requirements, expectations, and preferences of customers and markets to ensure the continuing relevance of your products/services; and, to develop new opportunities.
- 45 b. Describe how your organization builds relationships to acquire, satisfy, and retain customers and to develop new opportunities. Describe also how your organization determines customer satisfaction.

4. Information and Analysis 90

The *Information and Analysis* Category examines your organization's information management and performance measurement systems; and, how your organization analyzes performance data and information.

Issues to Address in your Challenger Award Application:

- 50 a. Describe how your organization provides effective performance measurement systems for measuring, analyzing, aligning, and improving performance at all levels of your organization.
- 40 b. Describe how your organization ensures the quality and availability of needed data/information for its employees, suppliers/partners, and customers.

5. Human Resource Focus 85

The *Human Resource Focus* Category examines how your organization motivates and enables employees to develop and utilize their full potential in alignment with your organization's overall objectives and action plans. Also, examined are the organization's efforts to build and maintain a work environment and an employee support climate conducive to performance excellence, and to personal and organizational growth.

Issues to Address in your Challenger Award Application:

- 35 a. Describe how your organization's work and jobs, compensation program, career progression, and related workforce practices motivate and enable employees (and the organization) to achieve high performance.
- 25 b. Describe how your organization's education and training support the achievement of your overall objectives including building employee knowledge, skills, and capabilities; and, contributing to high performance.
- 25 c. Describe how your organization maintains a work environment and employee support climate that contributes to the well-being, satisfaction, and motivation of all employees.

6. Process Management 85

The *Process Management* Category examines the key aspects of your organization's process management, including customer-focused design, product/service delivery, key business, and support processes.

Issues to Address in your Challenger Award Application:

- 45 a. Describe how your organization manages key processes for product and/or service design and delivery?
- 25 b. Describe how your organization manages its key processes that lead to business growth and success.
- 15 c. Describe how your organization manages its key processes that support your daily operations and your employees in delivering products and services.

7. Business Results 450

The *Business Results* Category examines your organization's performance and improvement in key business areas – customer satisfaction, product and service performance, financial and marketplace performance, human resource results, and operational performance. Also examined are performance levels relative to those of your competitors.

Editor's Note: Please focus your responses to the following questions by citing specific Results you have achieved. Charts and graphs are encouraged to summarize your Results. Avoid anecdotal responses that cannot be validated by numerical data.

Issues to Address in your Challenger Award Application:

- 125 a. Summarize your organization's customer focused results, including customer satisfaction and product and service performance results. Segment your results by customer groups and market segments, as appropriate. Include appropriate comparative data.
- 125 b. Summarize your organization's key financial and marketplace results, segmented by market segments, as appropriate. Include appropriate comparative data.
- 80 c. Summarize your organization's human resource results, including employee well-being, satisfaction, development, and work system performance. Segment your results by types and categories of employees, as appropriate. Include appropriate comparative data.
- 120 d. Summarize your organization's key operational performance results that contribute to the achievement of organizational effectiveness. Include appropriate comparative data.

Application Timetable

The Challenger timetable is as follows:

September 3-4, 2002

One-Stop Steering Committee devises a strategy to complete the self-assessment exercise. As recommended in the criteria, key members should be assigned to the seven categories (7 teams) and will need meet regularly until assignments are completed.

Form a Writing Team who will complete the Organizational Profile (this needs to be done first). When the teams have completed their work the Writing Team will assemble the various findings from each team and create a succinct report.

Assign a Team to address the statutory requirement (this is separate from the self-assessment process see Attachment A).

November 18, 2002

Writing team has the input from the seven Category Teams and drafts the Challenger Application.

Checklist and narrative are completed on statutory requirements (Attachment A).

December 9, 2002

Consensus meeting for entire team to reach consensus on the Challenger Application.

December 16, 2002

Writing Team finalizes report.

December 31, 2002

Challenger application and the statutory criteria are submitted to the MCWIB.

January 1, 2003 - February 15, 2003

The MCWIB Examination Team reviews and scores the application and Attachment A. They will also schedule a site visit to the One-Stop/s to verify and clarify information. After the site visit/s, a final score will be issued and a feedback report completed listing strengths and opportunities for improvement.

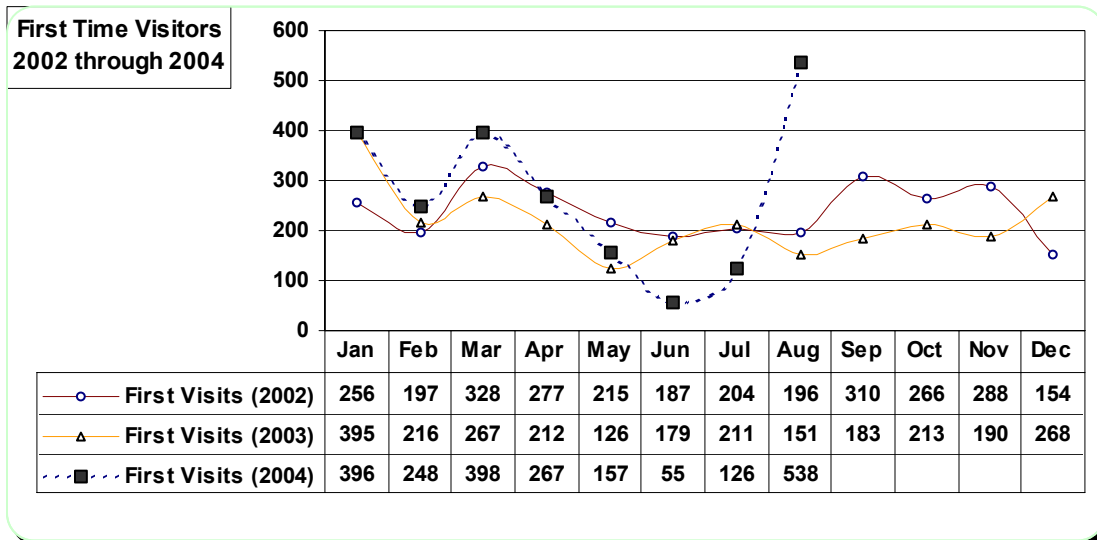
February 20, 2003

The MCWIB will grant **Certification** if the Challenger Score of 75 is met and 100% of the statutory requirements are met.

If the Challenger score of 75 is met, but the 100% statutory requirement is not reached, the One-Stop will be granted a **Conditional Certification** and must meet the requirements within 2 months, and at that time would be certified.

If the Statutory requirement of 100% is met, but the Challenger score of 75 is not reached, the applicant will be given a **Conditional Certification**. They can address the opportunities for improvement and reapply at any time. When the minimum score is met, they would be granted a **Certification**.

WorkNet Customer Service Data for August 2004



The following pages show charts and graphs of data collected from our Day Passes received from our customers during the month of August 2004. Data presented in this report are by all locations and then by individual location (Merced, Livingston, and Los Banos). The following text is for all Locations.

Customers

In the month of August 2004, all locations recorded 4,173 sign-ins with 1,422 customers returning the Day Pass and 538 first time visitors. Afternoon was the most popular time for customers to use our services, with 832 customers. Morning received 567 responses from our customers. Twenty-three customers did not respond to this question.

Customer Employment Status

Of the 1,422 customers that returned the day pass, 7 said they are employed full-time; 7 responded with part-time employment; and 12 responded with temporary employment. Seven hundred sixty-eight customers responded with not employed. Six hundred twenty-eight customers did not respond to this question.

How did you hear about us?

Returning customers complete this question during the first full week of August and then receive a shorten version of the Day Pass which excludes this question. Forty-eight returning customers responded to this question with walk-in being the most frequent response. The next most frequent response was Family/Friend and Newspaper Ads with 8 responses. Of the 538 first time visitors, 177 responded to this question. Friend/Family was

Customer Service Data for August 2004

the most frequent response with 118 responses. CalWorks with 18 responses was the next most frequent response.

Customer Satisfaction Question

For all locations, customer satisfaction questions received ratings between 9.71 and 9.65 with "Were you satisfied with the services?" receiving the highest rating of 9.71. There was five responses from our customers that rated our services with a five or less in the month of August.

How do our customers use our services?

In the month of August, our customers report using the computer most often with 1,148 responding to this question. Computer usage is broken out into five categories with CalJobs/Internet Job Search receiving the most responses (539); Resume/Cover Letter was second with 223 responses.

For non-computer related services, the Job Listing was the most often used service by our customers, with 513 responses. Telephone was the next most often used service with 428 responses.

The following list of remaining services is in the order most used by our customers:

Fax (195)	Plato Lab (176)	Copier (86)	Workshop (12)
Typewriter (9)	Orientation (8)	Resource Library (6)	
Skills Certificate (3)			

Have questions, comments, or suggestions about this monthly report, please email them to pitd26@co.merced.ca.us.

**Summary Data for Customer Service for August 2004
(Day Pass Information)**

	Aug 03	Jun 04	Jul 04	Aug 04
Daily Sign-ins	3,837	4,060	4,163	4,173
Daily Questionnaires	1,576	1,507	1,324	1,422

First Visit	151	55	126	538
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Customer Satisfaction

Courtesy of Staff	9.64	9.64	9.90	9.66
Time it took for staff to assist you	9.61	9.91	9.90	9.65
Did you get the information you needed	9.65	9.70	9.90	9.70
Were you satisfied with the services?	9.68	9.73	9.81	9.71
Did we help you today?	9.64	9.79	9.90	9.67

What did our customer use?

Computer	1,045	983	1,062	1,148
CalJobs/Internet Job Search	439	475	476	539
Resume/Cover Letter	211	235	224	223
Typing Practice	69	35	37	55
Typing Certificate	14	5	2	3
Career Exploration	52	67	23	10
Job Listing	330	262	362	513
Fax	255	142	204	195
Copier	188	108	105	86
Telephone	225	128	255	428
Typewriter	16	1	6	9
Resource Library	16	6	5	6
Skills Certificate	11	5	5	3
Plato Lab	230	394	218	179
Workshop	18	27	8	12
Orientation	19	12	2	8

How did you hear about us?

Newspaper ad	8	0	2	8
Radio ad	0	0	0	1
Flyer/Brochure	1	0	0	1
Friend/Family	7	6	0	8
EDD	7	0	1	4
Merced Mall	0	0	0	0
Billboard	0	0	0	1
TV ad	0	0	0	0
Internet	1	0	0	3
Walk-in	33	11	2	18
CalWORKs	5	1	2	3
Phonebook	2	0	0	1

Marketing advertisements for August 2004.

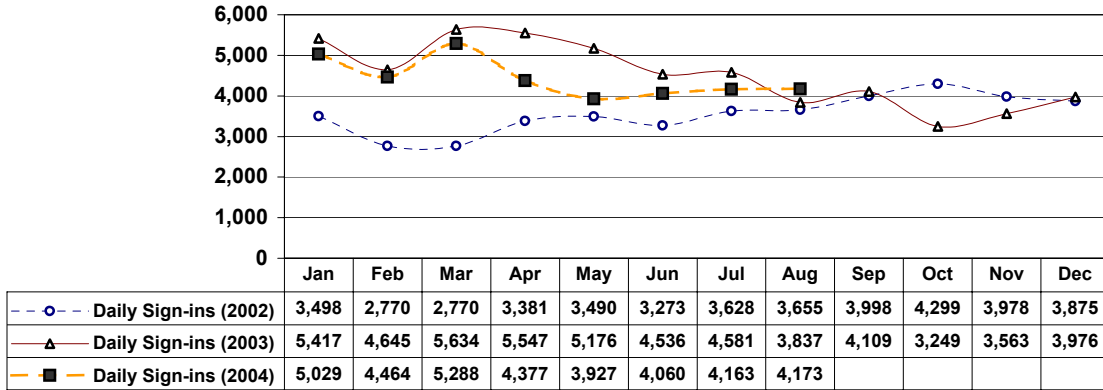
All Month: Radio Stations: KABX, KHPO, KYOS, KBRE

08/3-7, 10-14, 17-21, 24-28, 31/2004: Various Newspaper Ads

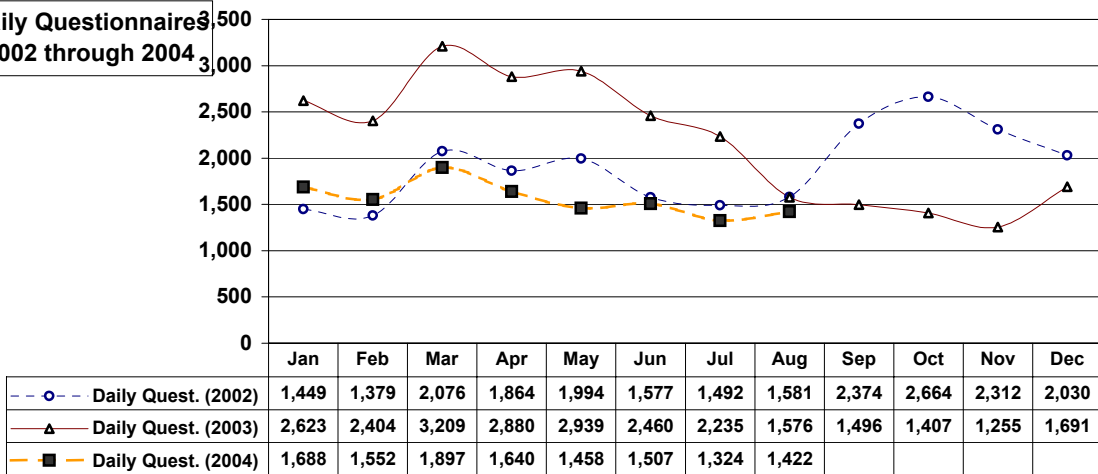
Worknet Signs placed inside all Merced "The Bus" buses.

**WorkNet - Annual Comparison
2002 through 2004**

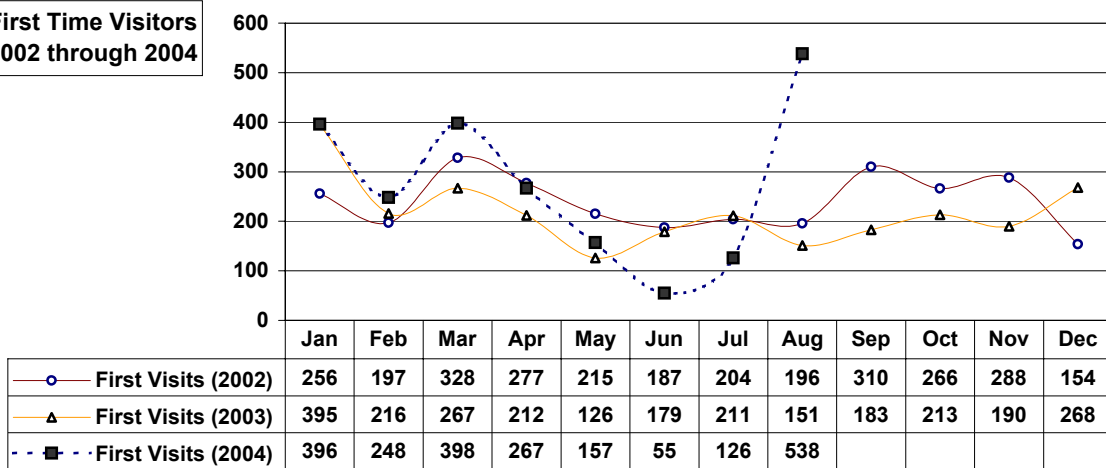
**Daily Sign-ins
2002 through 2004**



**Daily Questionnaires
2002 through 2004**



**First Time Visitors
2002 through 2004**



TO: Quality Assurance Committee

DATE: 9/24/04

FROM: WIB Staff

For Action

For Information

For Discussion

SUBJECT: Monitoring Report

PROPOSED MOTION(S): Information Only

DISCUSSION: The Customer Service Unit monitored contracts, agreements and MOUs for the last six months of FY 2003/2004. The report is presented to the Quality Assurance Committee. The report includes a review of Individual Training Accounts (ITAs), Fee-Based Contracts, and On-the-Job Training (OJT) Contracts.

ATTACHMENT(S):

WIA Monitoring Activity Summary, January 2004 through June 2004.

Workforce Investment Act (WIA)

Monitoring Activity Summary

January 2004 Through June 2004

The Department of Workforce Investment monitors all contracts on behalf of the local Workforce Investment Board. All subrecipients and vendors are monitored at least once per year to assure program and fiscal integrity as well as compliance with state, federal and local requirements. The new program year monitoring cycle commenced on July 1, 2004. In addition to scheduled monitoring, the Monitoring Unit also provides technical assistance to local providers, maintains liaison with EDD state officials, and researches and interprets Workforce regulations and implementing directives.

One-Stop Monitoring

All One-Stop partners have been monitored. Overall, each of the partners has made positive strides in ensuring conformity with the WIA. No findings were noted; however, 'observations' were noted to improve overall program quality; i.e., implementation of a customer satisfaction survey to gain customer feedback, development of cross-training procedures for customer referrals, and usage of a common referral form for prospective customers. These items have been addressed with the Worknet Leadership Team.

The following partners were reviewed.

1. One-Stop Operator, Department of Workforce Investment
2. Central Valley Opportunity Center
3. Merced County Office of Education
4. Merced College
5. Community Action Agency
6. Experience Works
7. Action Business Center
8. Employment Development Department
9. Housing Authority
10. Human Services Agency, Title V (Older Worker program)
11. Department of Rehabilitation

Contract Monitoring

All contracts have been monitored. The reviews assessed both programmatic (quality of training and compliance with the WIA) and fiscal management (assurance that all training/service costs are allowable, necessary and charged to the appropriate budget cost category). The following contracts have been monitored for the 2004 Fiscal/Program Year:

1. Grossman Storage. This contract is for Department (WI) storage space at Cooper Ave, Merced.
2. POST Academy. This contract, in collaboration with the Merced Police Department and Modesto Junior College, provides basic police training to eligible candidates to increase the number of peace officers for the local community.

3. GEAR UP Merced. The Gear Up Merced project is a federally funded program designed to prepare local high school students for acceptance into the University of California system.
4. The Greater Merced Chamber of Commerce-Workforce Academies. This contract was a grant from Dept of Labor for \$20,000 for the Chamber, in collaboration with the Department, to conduct surveys of employers to determine workforce needs, one-day academies for discussion of those workforce needs as well as solutions and resources for businesses, followed up by roundtables.
5. Merced College, Plato Lab (Los Banos) – This contract is to provide assistance to upgrade basic skills deficiencies and GED.
6. Merced Adult School, Plato Lab (Merced) – This contract is to provide assistance to upgrade basic skills deficiencies and GED.
7. Merced College, (RN) – Contract is to provide for Merced College to enroll increased numbers in the RN program each semester; currently at 6.
8. Merced College, (LVN) – Contract is to provide for Merced College to enroll increased numbers in the LVN program each third semester; currently at 12.
9. Wellness Grant – This is a grant from Dept of Labor for Merced College, in collaboration with the Department, in the amount of \$85,428, to provide a Nursing Ambassador Manager, a Success Monitor and Nursing Ambassadors as well as a Student Stipend Program for a scholarship.

Individual Training Accounts (ITAs)

The ITA voucher system is used to finance occupational training for Adults and Dislocated workers. Training providers, utilizing the ITA system, are identified through the state Eligible Training Provider List (ETPL). The ETPL also provides program information, such as performance statistics, cost and length of training, etc. Each program must, at a minimum, provide a course of study that leads to a certificate, an Associate/Baccalaureate Degree, or a competency/skill recognized by employers. Through the ETPL, customers can make an informed choice as to which provider is best suited for their particular needs. The Department (WI) had fifteen (15) Training Agreements for the monitoring period with service providers utilizing the ITA vouchering system.

1. Institute of Technology
2. MCOE (office occupations)
3. Truck Driving Academy
4. Computer Tutor
5. Quality College
6. Abrams College
7. Boston Reed
8. California School of Technology
9. Cal Trade Welding School
10. CVOC
11. Contractor's License Exam Center
12. Contractor's State License School
13. HVAC Training Institute
14. Valley Vocational College
15. Western Pacific Truck School

On-The-Job Training Contracts (OJT)

OJT contracts may be provided to Adult, Youth or Dislocated workers to provide occupational training. These contracts are limited to the period of time required for a client to become proficient in the occupation for which the training is being provided. Reimbursement of up to fifty percent of the participant's wages may be provided to the employer in exchange for the employer's incurred training costs.

Eight (8) OJT providers were monitored in the period of January 04 through June 04. A total of 18 participants received OJT through these providers. The number in parentheses next to the provider reflects the number of participants they had.

1. Idle Aire (5)
2. Hillview Packing (1)
3. Horizon Health (2)
4. Sierra Engineering (1)
5. Sport & Rehabilitation (1)
6. B&T Industries (6)
7. Werner (1)
8. Golden Valley Contractor (1)

Findings and/or observations of any of the above ITAs, MOUs, Contracts and OJTs during the monitoring process were primarily of an administrative nature and were immediately addressed and resolved, and all reports are closed.

Youth Monitoring

1. Younger Youth. (Monitored November 03 through March 04). The Merced County Office of Education (MCOE) is responsible for the administration of the Younger Youth (14-18 year olds) Year-Round Program. MCOE partnered with six community-based organizations in the overall administration of the program. Monitoring of the youth program covered a variety of program requirements, such as: eligibility verification; WIA forms maintenance; objective assessment; individual service strategy (ISS); linkages between academic learning and occupational skills and much more. Within the time frame monitored, the Youth Program attained a 73 % target enrollment rate, exceeded the Youth Council's supplemental goals and, with only one exception, surpassed the state performance standards for the first and second quarters. Of particular note was the structured course curriculum employed by all partners to assure uniformity of instruction. Overall, MCOE is in compliance with the requirements set forth by the WIA.
2. Older Youth. (Monitored March through June 04). The Merced County Office of Education (MCOE) is responsible for the administration of the Older Youth 'Empower' Program. In September 2003, MCOE was awarded the Out-of-School Youth contract. Award of the contract was due to the demise of the former youth provider. MCOE's efforts to integrate and accommodate the former students into the Empower program in an efficient and timely manner have been commendable. The Empower Program has served approximately 192 participants with a diverse array of pre-employment preparation activities and services; i.e., work experience, vocational training, soft skills training, one-on-one mentoring, and much more. Enrollments continue to increase and can be attributed to positive 'word of mouth' endorsements from program participants as well as other recruitment efforts. In

collaboration with other community-based organizations—EDD, CAA, Lao Family, MAS, etc., the Empower Program is meeting the youth contract’s primary objective of “The empowerment of young adults in preparation for permanent employment”.

Board Agenda Items (BAI)

The Monitoring Unit reviews all BAIs and new/continued contracts for overall WIA compliance; i.e., required boilerplate clauses, procurement methodology, accuracy of budget data, and content and substance of proposed contracts. As of January 2004, 16 reviews of various BAIs and contracts have been accomplished.

EDD Nondiscrimination/Equal Opportunity and Physical/Program Access Self-Evaluation

The Monitoring Unit conducted a state mandated self-evaluation of the Department’s compliance with the requirements set forth by the Americans with Disability Act (ADA) for physical access and the WIA for Nondiscrimination/Equal Opportunity. The State EDD and the Department of Rehabilitation provided self-evaluation checklists to facilitate the review. The self-evaluation was performed in April and May 2004, with the final report submitted to the EDD Compliance Review Division (CRD) on May 15, 2004. Overall, the Department (WI) fared well in compliance with the governing regulations.

Americans with Disabilities Act (ADA) Training

The Monitoring Unit coordinated with the Department of Rehabilitation, Disability Access Section, to provide ‘Disability Awareness’ training for the Merced WI staff. Training was conducted on May 25 and June 22, 2004. All Department staff attended one of the two sessions. The sessions were very informative, worthwhile and gave Department personnel a better appreciation and understanding of the issues that face disabled Americans. Subsequent training sessions are being planned.

Additional Services

In addition to the regular monitoring of training/service providers, the monitoring unit:

1. Reviews RFPs, contracts, agreements and MOUs prior to finalization.
2. Offers technical assistance to service providers.
3. Conducts courtesy inspections; e.g., participant file reviews, safety, and ADA compliance.
4. Research and interpretation of WIA directives and regulations.

TO: WIB Quality Assurance Committee

DATE: 09/24/04

FROM: WIB Staff

For Action

For Information

For Discussion

SUBJECT: WIB Strategic Scorecard

PROPOSED MOTION(S): To approve the Measurement categories assigned to the Quality Assurance Committee and to approve the overall Scorecard.

DISCUSSION: The Merced County Workforce Investment Board Strategic Scorecard has been completed and is now being reviewed by each committee. Once all applicable committees have reviewed the scorecard it will be sent to the WIB for approval.

The Executive Committee has not formally reviewed the scorecard, but they were provided the scorecard during their August meeting and voiced approval.

ATTACHMENT(S):

WIB Strategic Scorecard

MERCED COUNTY WORKFORCE INVESTMENT BOARD STRATEGIC SCORECARD

WIB GOALS

Goal # I Train and attract adaptable workers to fill industry needs.

Goal # II Influence the K-12 education system to design and implement strategies that provide students knowledge of employee skills and attitudes and develop metrics to assure success.

Goal # III Become an active advocacy voice and take political action on workforce development issues at the local, state, and national levels.

Measurement Category: Customer Perspective

Measure/Indicator	Metrics	Method	How Often Review	Responsible WIB Committee
1. Business Customer Satisfaction				
a. Employer Needs Are Being Met	80% Satisfaction Rate & Increase in the # of Employers using Worknet Services	Face to face 10 Question Survey of 30 Employers	Annually	QA & BSU
b. Are the Right Industries Targeted • Economic Development Targeted Industries • Growth Industries	Compare targets and adjust industry focus, if necessary	Review LMI (Growth Industries & Early Warning Data (in development))	Biannually	PP&D
2. Job Seeker Customer Satisfaction				
a. Job Seeker Needs Are Being Met	90%	Worknet Day Pass	Monthly	QA
b. Input from Customers Is Used To Improve Services	Rating to meet or exceed	Benchmark to similar service organizations	Biannually	QA
3. Workforce Development Advocacy/Awareness	# Of Face to Face Meetings compared to previous year # Of Written	Meetings with Legislators Written Communication with	Biannually	Executive

MERCED COUNTY WORKFORCE INVESTMENT BOARD STRATEGIC SCORECARD

	<p>Communications compared to previous year</p> <p>Voting record of Legislators</p> <p>Positive impact to Support Local Control</p> <p>Stable or increased WIA Funding</p>	<p>Legislators (requesting a response from them)</p> <p>Invitations to WIB Meetings</p> <p>Invitations to Worknet, i.e., for a tour, Chamber Mixer, etc.</p>		
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Measurement Category: Internal Operations/Organizational Effectiveness

Measure/Indicator	Metrics	Method	How Often Review	Responsible WIB Committee
1. Program Accountability:				
a. Plan vs. Actual Participant Activity				
• Numbers	Planned vs. Actual	Participant Reports	Monthly	QA
• Demographics	Participants vs. Merced Co. Demographics	Participant Reports	Biannually	QA
• Performance Measures	Attain 80% level on Goals	Performance Reports	Quarterly	QA
b. Report Results:				
• Audits	Zero Findings	County Audit	Annually	QA

MERCED COUNTY WORKFORCE INVESTMENT BOARD STRATEGIC SCORECARD

<ul style="list-style-type: none"> • Monitoring • Youth Quarterly Program Reports <li style="padding-left: 20px;">Out-of-School Youth <li style="padding-left: 20px;">Younger Youth <p>c. Resources are Allocated Appropriately:</p> <ul style="list-style-type: none"> • Pilot Program in a specific Industry cluster (offering career ladders or move up strategy) • Quality Controls • Productivity 	Zero Findings	EDD Monitoring WI Monitoring	Annually Biannually	QA
	Acceptable Progress based on contract timeline	Report from MCOE	Quarterly	YC
	Acceptable Progress based on contract timeline	Report from MCOE	Quarterly	YC
	Review results of training job and placements in the industry	Identify and select an Industry cluster	Biannually	PP&D
	Improved Scores	Customer Satisfaction Data	Yearly	QA
Attainment	Performance Measures	Yearly	QA	

Measurement Category: Financial/Market Perspective

Measure/Indicator	Metric	Method	How Often Review	Responsible WIB Committee
1. Expenditures including: <ul style="list-style-type: none"> • Obligations • Accruals (Expenses) • Encumbrances • By funding source • By service • Plan vs. Actual 	80% Expended by End of Year	Fiscal Reports	Monthly	Finance

MERCED COUNTY WORKFORCE INVESTMENT BOARD STRATEGIC SCORECARD

2. Revenue & Resources:				
a. Grants	#s Applied for and Source #s Received and \$\$ Amounts	WI Report	Biannually	Finance
b. Revenue Generation	# of Sources Amount of \$\$	WI Report	Biannually	Finance

Measurement Category: Learning and Innovation

Measure/Indicator	Metric	Method	How Often Review	Responsible WIB Committee
1. Progress in Preparation for Worknet Recertification	On Schedule	Report from Worknet LT on Time Line	Bimonthly	QA
2. Influence the Workforce Investment System				
a. Education	Report on Activity	Participate on the P-16 Council	Quarterly	PP&D
b. Economic Development/Castle Development	New Jobs Created Jobs Lost	Reports by MCEDCO, BEO and EDAC. Reports on Rapid Response activity	Quarterly	PP&D
c. Workforce Housing	# of New Units Built # of building permits issued for workforce housing	Support the WIB Policy on Workforce Housing	Yearly	Executive

Glossary

BSU - Dept. of WI Business Services Unit

Executive - WIB Executive Committee

Finance - WIB Finance Committee

PP&D - WIB Program Planning & Development Committee

QA - WIB Quality Assurance Committee

YC - Youth Council