

Making WIOA Measures Meaningful

HOW VERMONT
BROUGHT THEM
INTO VIEW

13TH ANNUAL
SUMMIT
CONFERENCE,
NOVEMBER 3, 2020

The story of Vermont's Dashboard, in five chapters

Scanning the landscape – What changed with WIOA?

Charting a new course – Where do we need to get to and how?

Gathering our supplies – What will keep us fueled and oriented?

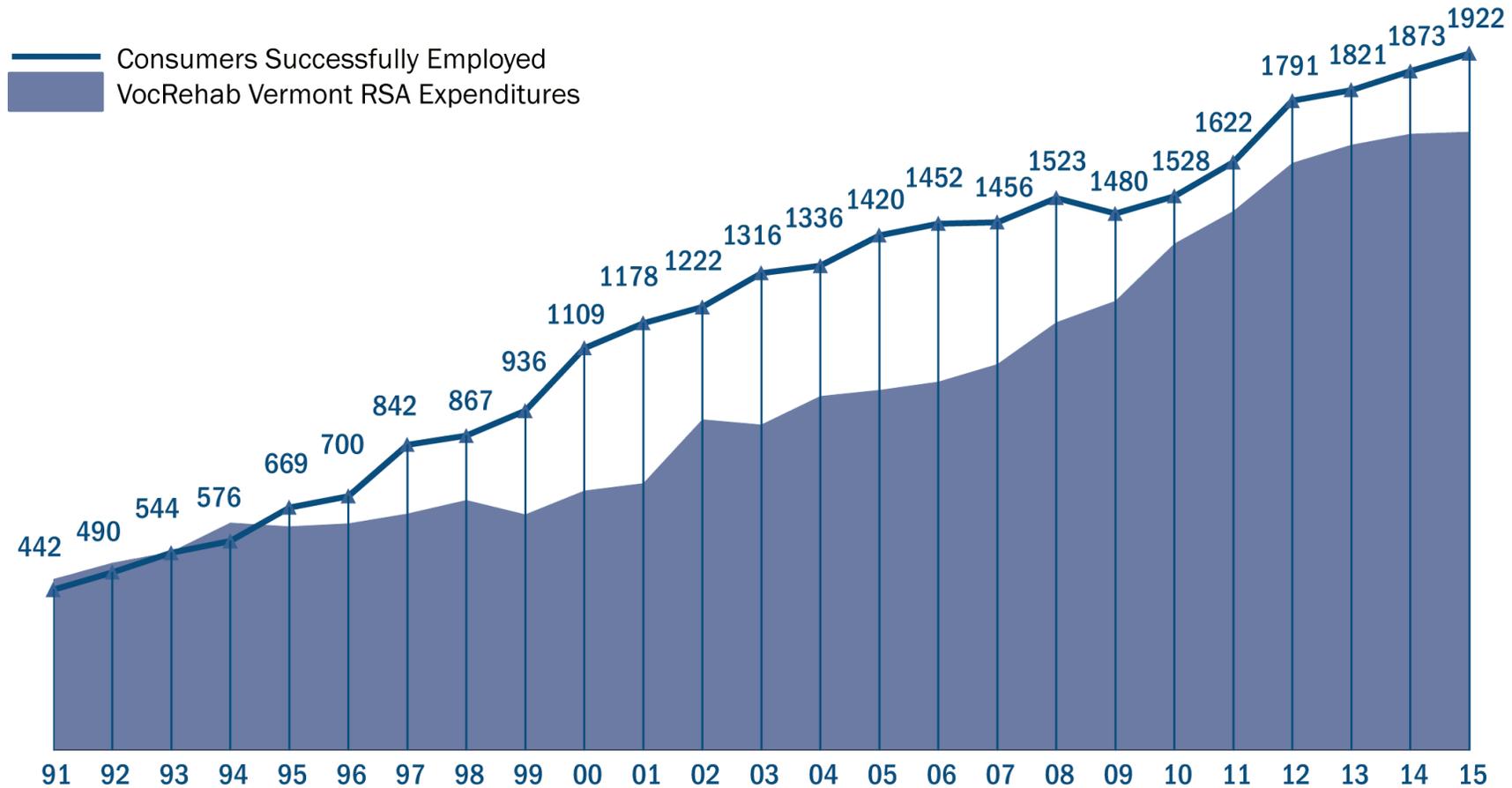
Bringing everyone along – How do we engage staff in this change?

Checking our progress – Are we headed in the right direction?

Scanning the landscape

WHAT CHANGED WITH WIOA?

Vermont VR, before WIOA





Then WIOA
strikes.
A chasm opens
between old
practices and
a new vision

RSA Standards and Indicators

Get x% of people in plans into a job and stable for 90 days

Close as a rehab

(rehab rate)

Get at least 1 more rehab each FFY

(rehab count)

Production (get the rehab)

Short term outcomes (get the rehab)

Old practices
New vision

WIOA Common Performance Measures

Get people equipped with career-relevant skills

(measurable skill gains, credentials)

Get people to higher wages and sustained employment

(median earnings, employment rate a full year post-exit)

Quality (get skills and a good job)

Long term outcomes (keep the job)

The last 4 years ... a tsunami of change

Pre-Employment Transition Services 15% funding required

... brings significant restructuring of staff and services to focus on youth in school

Vermont goes live with AWARE after 18 intense months of implementation

... brings massive shift in how counselors interact with data, and new opportunities to explore

RSA reporting requirements are revised, and revised again

... brings new definitions to understand, vastly tighter timelines for reporting

Mandated MOUs and data interfaces with Labor and Education

... brings complex negotiations and closer working relationships

up a creek, no paddle



Charting a new course

WHERE DO WE NEED TO GET TO AND HOW?

WIOA measures tell us where to focus

Employment Indicators

1. % employed in 2nd quarter after exit
2. % employed in 4th quarter after exit
3. Median earnings in the 2nd quarter after exit

Education Indicators

4. % with post-secondary credential attainment during program or within 1 year after exit
5. % achieving measurable skill gains

Employer Indicator

6. Effectiveness of workforce system for employers, not yet defined

But they're like driving by staring in the rear-view mirror.

- I. Some can't be calculated until a year or more has passed since the case closed
- II. Most rely on administrative data with its own lags, or that can't come directly from the participant
- III. They aren't directly under our control

How is this motivating? Practical?

WIOA Lagging? Try Leading!

Lead Measures are actionable steps we can take to impact an outcome.

Lag Measures are the results of the actions taken

For example:

You have started a strict exercise and diet regiment and are tracking your **calorie intake, calories burned, time spent in aerobic activities** (lead measures)

and since then you have **lost weight** (lag measure)



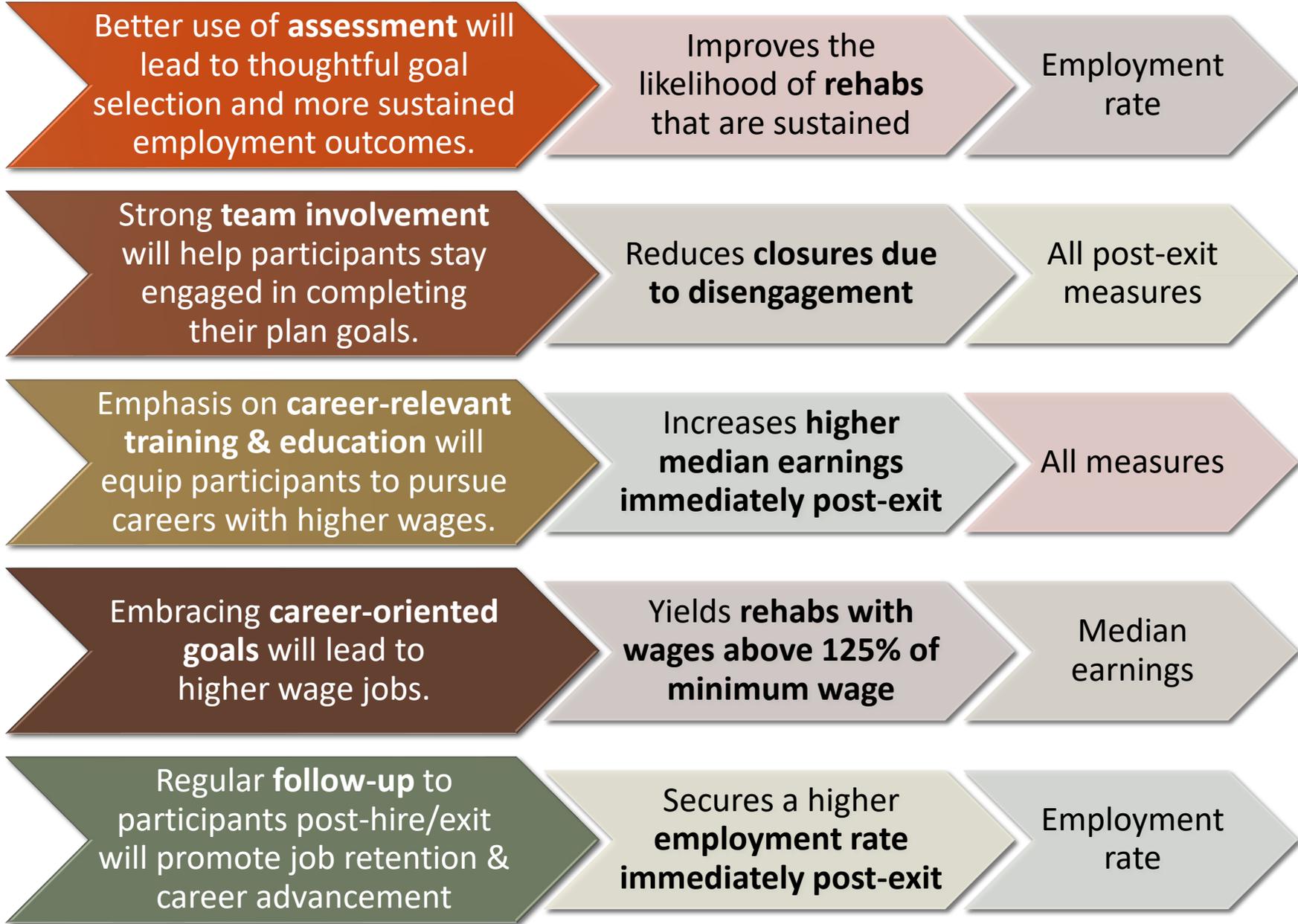
We put our heads together

What should we do and measure in the present...

...that will help our customers do well in the near future...

...so VR does well on the WIOA measures farther out?





Result:
5 Lead-Lag pairs
all targeted to
improve WIOA
performance

Enter the Careers Initiative!

Interwoven project
charters and workgroups
to address all aspects of
our WIOA-driven
paradigm shift from
Rehabs to Careers

- I. **Career Counseling & Assessment** – how do we select effective tools and use them to best advantage?
- II. **Progressive Education** – how do we cultivate participant engagement in training & secure the trainings they need?
- III. **Motivational Interviewing & Career-Informed Plans** – how do we use MI to foster confidence and hope within our participants to consider their career aspirations?
- IV. **Follow-Up** – how best to structure ongoing engagement with participants in jobs and after exit?
- V. **Resource Allocation** – where should our money and staff resources go?
and
- VI. **Dashboard** – how can we best illuminate our work & engage every staff member to move us along this path?

Gathering our supplies

WHAT WILL KEEP US FUELED AND ORIENTED?

Dashboard design objectives

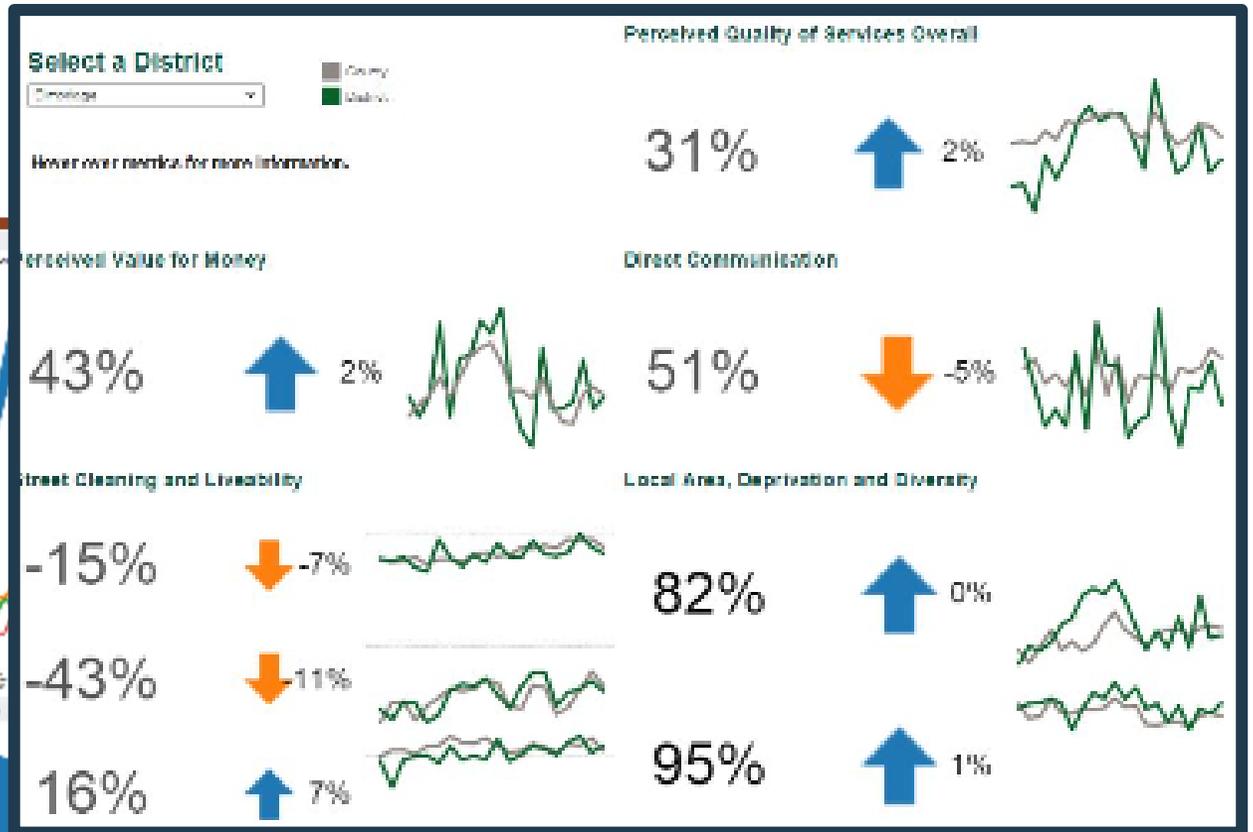
For Counselors / Regional Managers

everything I need to know
at a glance (but accessibly)
that helps me judge how I'm doing
within a useful frame of reference
so I can focus on what I need to do
to sustain my progress
toward desired outcomes
while maintaining compliance

For Data Unit / Management

a fully functional, reliable,
refreshable, and responsive tool
that we can independently
develop, tweak, and maintain
that is simple, yet supports depth,
transparency, questioning, and
action by the user
and that leaves open all
possibilities so we can change our
minds about what to measure and
display

No, It doesn't look like this



Maybe some day...

One File, Minimal Effort, Lots of Data

1 Excel template, tied to SQL.
Refreshed weekly (10 minutes).

Delivers data for:

- 33 measures
- Multiple levels
 - 65+ counselors
 - 12 districts, and
 - statewide
- 3 different time windows for each measure, as appropriate to the measure.
- Securely, as appropriate for the person logged in to see.

Dashboard for **Barre-Montpelier** for 10/12/2020 [Leading](#) [Lagging](#) [Workload](#) [Process](#)

Leading GEN Measures	Description	Target	Near-Term rate	Medium-Term rate	Long-Term rate	Trend	Difference in region	Difference from state
Team Involvement	What share of cases served have activities recorded by staff/external partners other than the case lead?	50%	▲ 51%	▲ 53%	▲ 54%	➡ -1%	☆ -8%	☆ -2%
Assessment	What share of VR cases served have had at least one assessment done?	50%	▼ 2%	▼ 2%	▼ 1%	➡ +1%	☆ -6%	☆ -3%
Within 180 days	New cases assessed within 180 days of application?	50%	n/r	n/r	n/r	n/r	n/r	n/r
Career-Focused Training	What share of cases served in plan status engaged in career-focused training or progressive education?	35%	▼ 21%	▼ 25%	▼ 23%	➡ -1%	★ +5%	★ +5%
Higher-Wage Plan Goal	What share of cases served in plan status had a higher-wage occupation as their latest plan goal?	35%	■ 31%	■ 31%	■ 28%	➡ +1%	★ +3%	★ +1%
Follow-Up	What share of VR date received at I							

Lagging Measures

Lagging Measures	Description
Case Completion	Cases closed by a team involvem
Rehab Rate	Case closures in p. employment. Doe
Median Earnings	Median earnings in plan status. Do
125% + Minimum Wage	Rehabs with wag having a higher-v
Post-Exit Employment	Rehabs employea Does post-placer

Dashboard for **Barre-Montpelier** for 10/12/2020 [Leading](#) [Lagging](#) [Workload](#) [Process](#)

Workload Measures	Description	Graph of Quarters	Sep 14 to Dec 13 2018	Dec 14 to Mar 13 2019	Mar 14 to Jun 13 2019	Jun 14 to Sep 13 2019	Sep 14 to Dec 13 2019	Dec 14 to Mar 14 2020
Average Caseload	Caseload measured at monthly point in time		579	511	450	396	379	364
Cases Served	Cases served in VR (excluding PAS/PES cases)		543	522	528	463	430	427
Applications	Applicants by application date (includes PAS/VR)		102	60	88	61	70	67
Made Eligible	Applicants certified eligible by eligible date		49	57	81	59	55	54
Initial Plans	Initial Plans completed and signed		37	35	66	54	46	44
PostSec Ed	Post-secondary education goals by start date		4	5	6	28	1	2
WBL Experiences	WBL experiences by start date		17	9	33	32	18	14
Job Placements	Job placements by hire date or application date		39	31	43	59	42	16
Pre-Plan Closures	Closures prior to reaching plan status		25	21	38	21	13	10
Closed No Rehab	Closures from plan status without a rehab		32	25	28	40	26	22
Rehabs	Closures with successful employment		27	30	21	22	19	21

Process Measures

Process Measures	Description	Target	Near-Term rate	Medium-Term rate	Long-Term rate	Trend	Difference in region	Difference from state
OnTime Elig	How often are eligibility decisions made within 60 days of application as required by RSA?	90%	▲ 95%	▲ 94%	■ 86%	➡ +5%	★ +3%	★ +7%
OnTime Plan	How often are initial plans signed within 90 days of eligibility as required by RSA?	90%	■ 85%	■ 78%	▼ 66%	▲ +9%	☆ +1%	★ +6%
OnTime Plan Review	What share of plans are compliant with RSA's annual plan review requirement?	90%	▲ 97%	▲ 97%	▲ 96%	➡ +1%	☆ -1%	★ +15%
Plan Csltd	What share of the caseload is comprised of cases in plan status?	80%	▲ 82%	▲ 82%	■ 78%	➡ +2%	★ +5%	☆ +1%
180 Day Active	What share of open cases show activity within the past 180 days?	95%	▲ 99%	n/r	n/r	n/r	★ +5%	★ +6%
90 Day Active	What share of open cases show activity within the past 90 days?	85%	▲ 93%	n/r	n/r	n/r	★ +5%	★ +9%
30 Day Active	What share of open cases show activity within the past 30 days?	50%	▲ 70%	n/r	n/r	n/r	☆ -2%	★ +8%
New Cases	What share of the caseload involves participants who applied in the past 3 months?	15%	▲ 19%	▲ 19%	▲ 20%	➡ -1%	★ +3%	★ +3%
Case Length	What share of the caseload involves participants who applied within the past 24 months?	80%	▲ 80%	▼ 77%	▼ 75%	➡ +3%	★ +5%	★ +3%
BC Involvement	What share of cases with SSI/DI beneficiaries have records showing BC involvement in case?	60%	■ 57%	■ 60%	■ 57%	➡ -0%	☆ -6%	★ +6%
Prior Auth	What share of case services auths are created before the service is authorized?	99%	▲ 100%	▲ 99%	■ 98%	➡ +1%	☆ +0%	★ +1%

Overview of Design & Access

User-specific data based on login.
 Allows access to supervisees.
 Provides trends and comparisons.

Dashboard for **alice porter**

Leading GEN Measures

- alice porter
- beatrix potter
- flopsy mopsy
- peter rabbit

Refresh Data v6

Dashboard for	alice porter							
Leading GEN Measures	Description	Target	My recent rate	My longer-term rate	My recent trend	My longer-term trend	How I differ from peers	How I differ from state
Team Involvement	What share of cases served have activities recorded by staff/external partners other than the case lead?	50%	▲ 61%	▲ 70%	▼ -9%	➡ +1%	★ +6%	★ +7%
Assessment	What share of VR cases served have had at least one assessment done?	50%	▼ 4%	▼ 4%	➡ +0%	➡ +1%	☆ -2%	n/r
<i>Within 180 days</i>	<i>New cases assessed within 180 days of application?</i>	50%			n/r	n/r	n/r	n/r
Career-Focused Training	What share of cases served in plan status engaged in career-focused training or progressive education?	35%	▼ 24%	▼ 18%	➡ +6%	➡ +4%	★ +6%	★ +7%
Higher-Wage Plan Goal	What share of cases served in plan status had a higher-wage occupation as their latest plan goal?	35%	▲ 45%	▲ 45%	➡ +0%	➡ +3%	★ +13%	★ +16%
Follow-Up	What share of VR cases with employment with a stable date received at least one follow-up contact?	75%	▼ 27%	▼ 0%	▲ +27%	▲ +13%	☆ -1%	☆ +1%

Views by Person, District, State

Near-term Lagging measures are tied to the Leading measures with the hypothesis that cases that had the Lead service (i.e., assessment, follow-up) will do better on the Lag measure.

Dashboard for	Rutland		for 10/12/2020		Leading	Lagging	Workload	Process
Lagging Measures	Description	Target	Medium-Term rate	Long-Term rate	Our rate for lead = YES	Our rate for lead = NO	Our YES:NO differential	YES:NO differential
Case Completion	<i>Cases closed by agreement vs disengagement. Does more team involvement improve this?</i>	70%	68%	67%	70%	67%	+3%	14%
Rehab Rate	<i>Case closures in plan status closed with successful employment. Does better assessment improve this?</i>	55%	55%	30%	50%	55%	-5%	-9%
Median Earnings	<i>Median earnings in 1st post-exit quarter for cases closed in plan status. Does training improve this?</i>	50%	45%	52%	50%	44%	+6%	3%
125% + Minimum Wage	<i>Rehabs with wages above 125% of min wage. Does having a higher-wage plan goal improve this?</i>	35%	52%	43%	43%	55%	-12%	20%
Post-Exit Employment	<i>Rehabs employed per UI data in 1st post-exit quarter. Does post-placement followup improve this?</i>	80%	63%	70%	n/r	63%	n/r	n/r

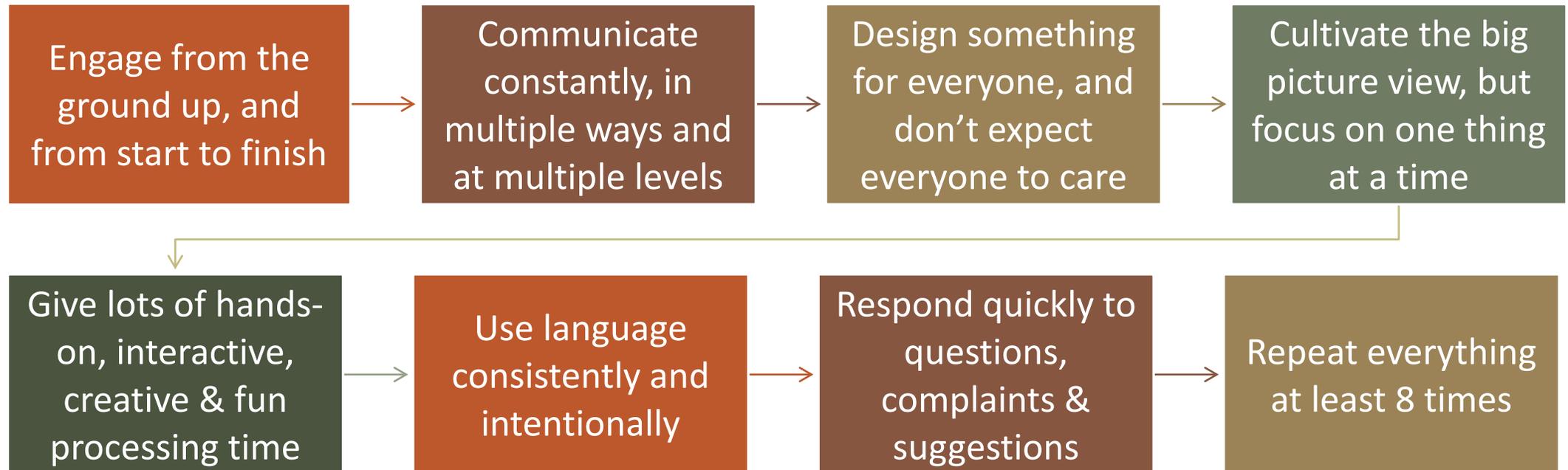
Supports Compliance

Dashboard for	Barre-Montpelier		or 10/12/2020	Leading	Lagging	Workload	Process		
Process Measures	Description	Target	Near-Term rate	Medium-Term rate	Long-Term rate	Trend	Difference in region	Difference from state	
OnTime Elig	How often are eligibility decisions made within 60 days of application as required by RSA?	90%	95%	94%	86%	+5%	+3%	+7%	
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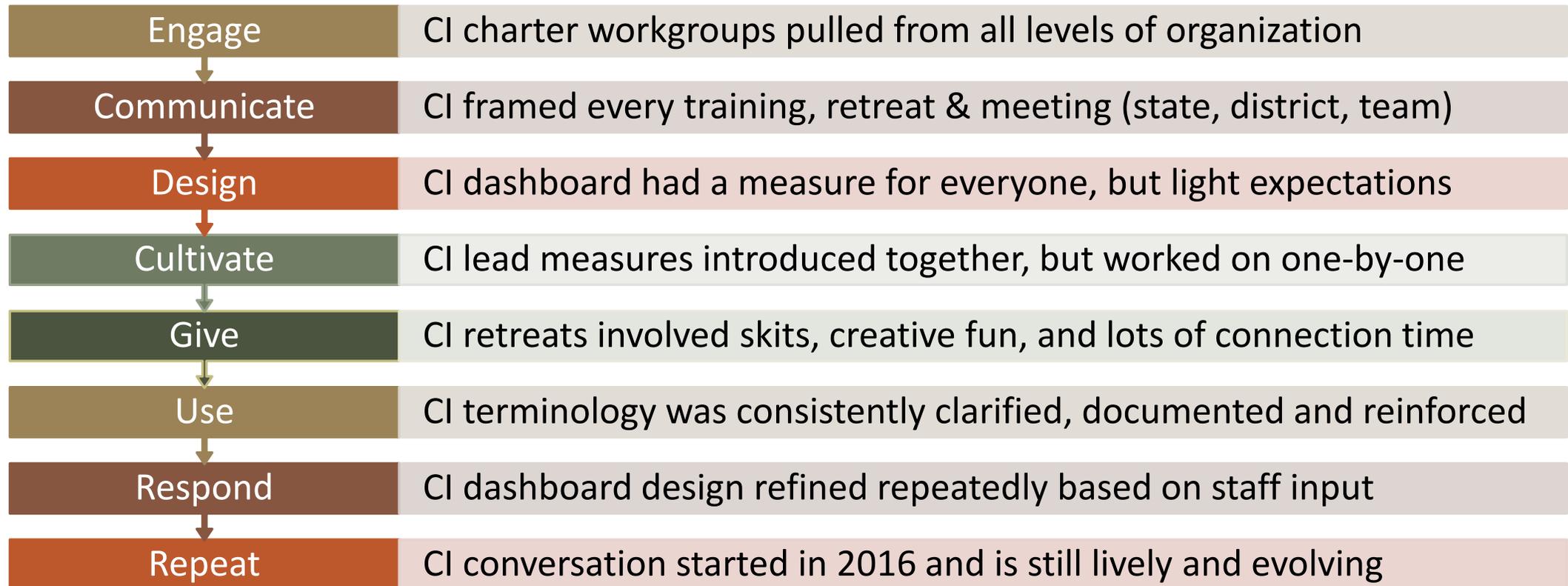
Bringing everyone along

HOW DO WE ENGAGE STAFF IN THIS CHANGE?

Changing practice is hard work



Learning to Speak CI



CI also means Continuous Improvement

- **Continuous discussion and learning**

- Frequent review and discussion at statewide and local training events, retreats, and team / manager meetings were essential for integrating and embedding it into daily practice.
- The 5 lead measures became the organizing framework for supervision / case teams / QA review.
- To feel confident and trust the dashboard, staff needed to understand how their data entry in Aware affected Dashboard results. Very complex calculations had to be distilled into simple guides with concrete steps that we demoed and practiced in hands-on training.
- Staff comprehension led to staff engagement and staff-led improvements; and new Careers Initiative Charters as well.

- **Continuous evolution**

- 6 version upgrades in past year to refine or add new measures and modify presentation
- 2 new tools added to deepen data presentation and ability to dive in, compare with past, and review trends

Checking our progress

ARE WE HEADED IN THE RIGHT DIRECTION?

Pulling together with purpose

We have the policy foundation and business intelligence to confidently move forward.

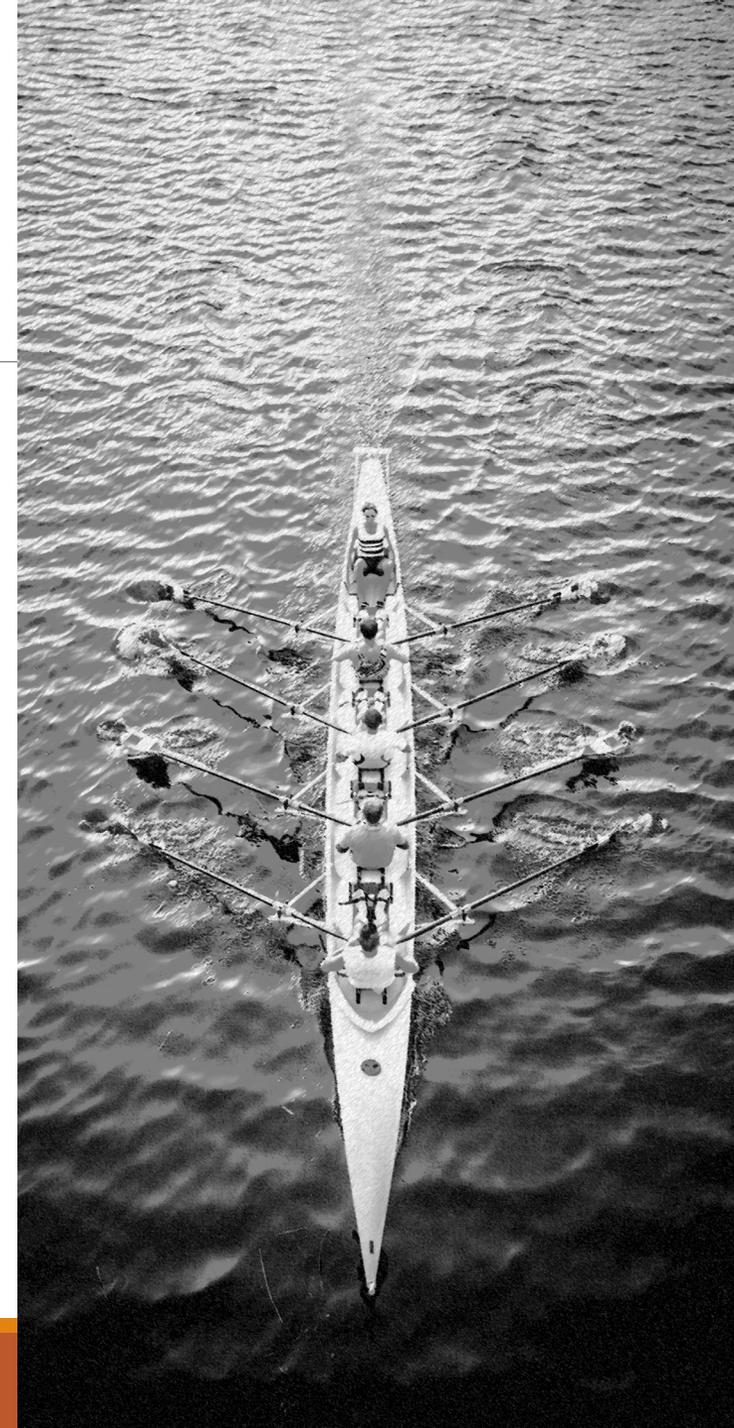
Leadership and staff are strongly aligned in our goals and vision.

A career orientation is permeating the organization.

Consumer & staff satisfaction are up, even with a pandemic to weather.

Staff have a deeper understanding of how to use our case management system, its data, and their work's connection to WIOA outcomes.

We are finding the energy to take on new initiatives.



A promising start

Dashboard Lead measures are trending up, as are lagging Dashboard and WIOA measures.

VT CI Lead Measures	Increase since start
Teaming	15 pct points
Assessment	7 pct points
Career-Focused Training	5 pct points
Higher Wage Plan Goals	3 pct points
Follow-Up for Job Retention	29 pct points

VT CI Lag Measures	Increase since start
125% of Minimum Wage	12 pct points
Rehab Rate	5 pct points

VT CI Process Measures	Increase since start
Benefits Counseling Referral	13 pct points
Timely Eligibility	6 pct points
Timely Plan	3 pct points

WIOA Measures	Increase over PY18
Employment Rate 2 nd Qtr	2 pct points
Median Earnings 2 nd Qtr	384 dollars
Credential Rate (VT estimate)	8 pct points
WIOA Partner Co-Enrollment	6 pct points

To continue the discussion with Vermont



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