



Jeb Bush
Governor
Susan Pareigis
Director

M E M O R A N D U M

DATE: August 18, 2005
TO: Regional Workforce Board Executive Directors
FROM: Susan Simpler, Deputy Director, Workforce Services
RE: Methodology for Determining Sample Sizes for Program Monitoring

As all of you are aware, Bishop, Cooke & Nembhardt, Inc. (BCN) has begun conducting programmatic monitoring of Program Year (PY) 2004-2005 records. In reviewing the number of records which were reviewed under the KPMG monitoring, and the methodology used to determine the sample size, it was noted that the samples for regions were not statistically valid. Several examples are:

10,439 Wagner-Peyser records – 6 reviewed
1,255 WIA records – 15 reviewed (Adult, DW & Youth combined)
4,607 Welfare Transition records – 22 reviewed

In an effort to achieve a more comprehensive review of workforce development programs, the methodology for determining sample sizes for program monitoring, for the July 1, 2004 through June 30, 2005 program year, has been revised. Monitoring samples for this year have been calculated by applying a 95 percent confidence level with a 12 percent confidence interval. This methodology change, while increasing the number of records selected for monitoring, effectively produces a statistically valid sample.

The attached spreadsheet provides a regional breakout, by program, of the sample sizes for this year's program monitoring. Please note that the calculation was re-configured following the initial piloting of the monitoring sample and review tool. The following details the selection criteria for each program area:

- *Wagner-Peyser - Participants with services beyond LMI and automated entries.
- Welfare Transition and Food Stamp Employment & Training – Participants with a service, training, activity, job tracking, sanction or deferral.
- WIA Adults and Dislocated Workers – Participants with activities funded through Adult or Dislocated Worker funding sources.
- WIA Youth – Participants with activities funded through Youth funding sources.

* WP - records are reviewed through OSMIS and does not require folders to be pulled for review.

Monitoring samples for special projects has been set at 10 percent of total completers, with a minimum of 10 and a maximum of 20 records.

Example:

1. 50 completers X 10% = 5. The monitoring sample will be set at 10.
2. 250 completers X 10% = 25. The monitoring sample will be set at 20.

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Please keep in mind that our overall purpose is to adequately and effectively assess program areas in your region in an effort to improve program performance and management. We greatly appreciate your cooperation.

If you have any questions or need any further assistance, please contact Tony Carter, of my staff, at (850)245-7406.

SS

Attachment