Event: Mid-Atlantic Peer to Peer Technical Assistance Workshop: Job Retention, Marketing to Employers, Strategies to Engage Clients

Date: September 20/21, 2000

Location: Philadelphia, Pennsylvania

1. INTRODUCTION

The Welfare Peer Technical Assistance Network, funded by the Administration for Children and Families, Office of Family Assistance, supported two 1-day workshops. The Department of Labor and the Department of Health and Human services jointly presented a Region III workshop examining job retention strategies, marketing to potential employers of welfare-to-work clients, and marketing services to those clients.

The agenda for the workshop was the same on both days, but the audiences were quite different. On the first day, TANF and WtW administrators from all Region III States were invited and all of the States (Delaware, District of Columbia, Maryland, Pennsylvania, Virginia, and West Virginia) were represented. The second workshop was for Welfare-to-Work competitive grantees and local providers. The purpose of the workshop was to develop and learn about strategies for client job retention, marketing Welfare-to-Work programs and employees to potential employers, and engaging clients in job retention programs and services. A copy of the day's agenda is attached as Appendix A. For a list of presenters and speakers, please see Appendices B and C respectively.

2. WELCOME

Eileen Friedman, TANF/CC Program Manager, Administration for Children and Families, and Sharon Wellons, Welfare-to-Work Team Leader, Employment and Training Administration, welcomed the attendees to the conference and noted its importance and timeliness. The collaboration of the Department of Health and Human Services and the Department of Labor to plan and present this event is an example of the collaboration between agencies that is encouraged in order to help move clients from welfare to self-sufficiency.

3. NATIONAL OVERVIEW OF JOB RETENTION

Anu Rangarajan, Senior Economist and Associate Director of Research at Mathematica Policy Research, Inc., presented findings from the Postemployment Services Demonstration (PESD) project. Ms. Rangarajan outlined some basic information regarding the working habits of welfare recipients. She noted some basic characteristics of jobs frequently held by welfare recipients which included low-pay, service or administrative positions, lack of fringe benefits, seasonal work, and non-standard hours. When asked as a part of the PESD follow-up survey, welfare recipients reported that the challenges of maintaining a job include:

- Problems at work (41%)
- Child care (34%)
- Finance/budgeting (33%)
- Family problems (30%)
- Transportation (25%)
- Housing (20%).

The PESD project also found that employment spells tend to be short (60-70 percent end within one year), the first six months of a job is a critical period, reentry into the workforce is common, but does take time, and employment experiences are diverse.

The PESD was an evaluation project that provided at least six months of personalized, case management support to newly employed welfare recipients in order to in to examine the impact of personalized job retention services on actual job retention by welfare recipients. The case managers involved provided counseling, job search assistance, help with benefits, service referrals, and support services for a wide range of work-related payments. Four sites in four different cities participated in the project: Chicago, IL; Portland, OR; Riverside, CA; and San Antonio, TX. Clients were randomly assigned to the program and contacted by a case manager within six weeks of beginning a job. Meetings were held as often as necessary for the client.

The job retention rates of the clients enrolled in PESD were virtually the same as those of clients not enrolled. Only in one city was there significant (3%) improvement in job retention rates. This lack of major impact might suggest services that go beyond case management are necessary, like intensive work-readiness training, mentoring/coaching, retention incentives, and more extensive job training and education. Also, the case management could be more effective if it was more structured and focused. Higher caseloads than expected may also have contributed to the program's performance.

PESD was quite a success for educational purposes—many lessons were learned. The outcomes of the programs stressed the importance of maintaining modest caseload sizes, establishing employer involvement, tailoring services to meet the needs of clients, and conveying clear and consistent expectations to both clients and case managers. Also, it was found that clients are not using post-TANF supports and benefits such as Food Stamps and Medicaid. Job retention programs should help link clients to services available to non-TANF clients.

When designing a job retention program, a lot of planning is necessary. The needs of the client population should be assessed and the program designed to meet those needs in a supportive atmosphere. Outreach should be creative and the enrollment process as easy as possible. Throughout the entire program, all services should be easily accessible. Other job retention strategies mentioned include wage supplements and other financial and non-financial behavior incentives. For instance, a client may be rewarded for being on time to work every day for two weeks, or for taking the initiative to go to two or more job interviews.

Job retention programs are necessary, but challenging to plan and maintain. For more information on the Postemployment Services Demonstration (PESD), visit http://www.mathematica-mpr.com/WELFAHOT.HTM.

4. JOB RETENTION—ONE COUNTY'S EXPERIENCES

John Rodgers, Deputy Director, Planning and Evaluation Division, Riverside County Department of Public Social Services in California, spoke about Riverside's success with job retention. Riverside, California has about 21,000 families on the TANF caseload currently, of which 12, 000 are receiving Welfare-to-Work benefits.

Riverside has a *Work Plus* Program that is divided into three phases. Phase 1 is designed to move clients into unsubsidized employment for 20 or more hours per week. The client will then move to Phase 2, which focuses on job retention, training and education. In Phase 2, the 20 hours per week minimum of unsubsidized work is still required, but hours spent on approved training and education can be counted toward a 32 hours per week work requirement. After the client has been working, and the family has gone off TANF completely, Phase 3 begins. Phase 3 services, delivered by community-based organizations, are designed to assist families with improving their self-sufficiency by focusing on mentoring, job retention, and training and education. Phase 3 is still in the planning stages and has not yet been implemented.

The piece of the Riverside *Work Plus* program that deals most with job retention is the second phase. It is important to note that community service, work experience, and partially subsidized employment do not qualify as unsubsidized employment. When a Welfare-to-Work client begins working at least 20 hours per week in unsubsidized employment, she is transferred from Phase 1 to Phase 2—which includes changing case managers. The Phase 2 case managers are separate from their Phase 1 counterparts and report to different supervisors. This separation allows the case managers to focus on the task of job retention rather than job placement. The performance standard for Phase 2 case managers is based on the number of clients retaining jobs and getting off aid, and the number of clients engaged in and/or completing training and education. Mr. Rodgers credits this simple system of evaluation with being crucial to the success of the program. Throughout Riverside's program, there are clear and distinct goals for the case managers as well as for the clients.

The training and education aspect of Phase 2 is very specific. Almost no training or educational activity expected to last for more than 12 months is approved. Also, clients are not sent directly to specific institutions. Rather, they are encouraged to find opportunities and institutions in the area are responsible for recruiting clients. This process enables the client to find a program that is a good fit, and forces the institutions to market to individual clients and to tailor their programs to work for clients. Initially, clients tend not to be interested in training and education. The financial benefits are not immediate, and many clients have had negative experiences with education in the past. Also, it is difficult for many to combine work and school while caring for a family at the same time. Currently, the program offers incentives to the entire family for completion of training or education. For instance, when the parent completes a 9-month training, the entire family may be rewarded with a personal computer, or a trip to Disneyland. Also, gift certificates for various family-oriented items are given at key points throughout the training and education process in order to reinforce and support retention in the program.

Phase 2 of the Riverside, California *Work Plus* program has proved to be a success. The second phase was adopted in 1998, and by July of 1999, only 8 percent of the Phase 2 clients were involved in training and education. Instead of giving up, however, the program was re-organized. It was at this time that the Phase 2 case managers and supervisors were separated from Phase 1. Also, the performance standards for the staff were made clearer at this point, and new management and resources were brought in. Since then, the numbers have improved dramatically. Today, 42 percent of Phase 2 clients are engaged in training and education. The current manager of the program has set a goal of 70 percent. Recently, the *Work Plus* program was selected to participate in the Employment, Retention, and Advancement (ERA) study by the Department of Health and Human Services and Manpower Demonstration Research Corporation.

5. JOB RETENTION—ONE STATE'S EXPERIENCES

Cindy Mund, Program Administrator, WorkFirst, Washington Department of Social and Health Services, spoke about Washington State's *WorkFirst* program. Washington's *WorkFirst* Program began in 1997, and was designed to help clients move from welfare to work and self-sufficiency within the imposed 5-year time limit. The three factors of success for the program are interagency collaboration, well-defined goals, and a monthly report card. Interagency collaboration involves, among other forms of communication, staff visiting different organizations and learning about different objectives and processes. The goals for the program and staff are well defined:

- Increase the rate of placements from *WorkFirst* into unsubsidized jobs
- Reduce the number of families who are dependent on public assistance
- Increase the percentage of families who remain self-sufficient after leaving welfare
- Increase the incomes of families who are, or were, on welfare with the child support due from an absent parent
- Improve the capability of adults who leave welfare for work to stay employed
- Increase earnings of former welfare recipients.

Ms. Mund emphasized the importance of designing and implementing clear and concise goals from the very beginning. Essentially, "you get what you measure." Washington State has instituted a "monthly report card" that measures performance according to the following numbers:

- Caseload
- *WorkFirst* adults entering employment
- *WorkFirst* adults with earnings from work
- Average earnings of *WorkFirst* adults working and receiving a grant
- Returns to assistance after six months and one year
- Increasing child support collections for TANF cases.

The *WorkFirst* program defines self-sufficiency not as "employed," but as going off TANF and moving ahead in a job. The principles of the program follow the idea of "a job, a better job, a better life." See Appendix D (attached) for a full list of the program's guiding principles.

Appendix E shows the "flow" of clients through the *WorkFirst* program. While there are 12 stages, few clients require all 12. At any stage, a client can find work or work activity. Initially, the program boasted a 90 percent job placement success rate. As the most employable clients moved to work and harder to serve clients moved through the program, the number fell to a still successful 70 percent to 80 percent. The initial stage of a job search involves an automated process that screens and evaluates a client's ability to look for work and take a job. This aids the client and case manager by identifying issues and providing a strategy for moving the client to self-sufficiency. Each client attends an orientation and job search workshop, where they are provided with a "Job Success Coach." Each of these "coaches" have caseloads of fewer than 50 clients and work non-traditional hours so that they may be available to clients at convenient times, and so they can be available to clients after they are employed. Once employed, clients have access to the WPLEX call center which contacts working clients by telephone, operates during evenings and Saturdays, and provides personal job search and retention services.

Ms. Mund suggests that the key to a successful job retention program is doing a few things well, rather than trying to do everything that comes along. She also agreed with Mr. Rodgers that clear and concise goals for both staff and clients are necessary if a program is to excel. She mentioned that the Manpower Demonstration Research Corporation publishes excellent resources in their series *ReWORKing Welfare*. For more information about such publications, visit http://www.mdrc.org.

6. MARKETING TO EMPLOYERS

June Allen, Chief of Rite, Employment and Retention Services, Rhode Island Department of Human Services, discussed strategies for marketing to potential employers of TANF recipients. She made it clear that "thinking like an employer" is key to success. Essentially, employers are focused on money or their "bottom line," and they need to know how hiring Welfare-to-Work employees will benefit them financially.

The most important strategy for marketing to employers is to build partnerships. As employers become more familiar with Welfare-to-Work employees and have positive experiences with their work, they will begin to go directly to Welfare-to-Work programs when they are hiring. Financial incentives for employers to hire TANF recipients can be key in developing relationships. Ms. Allen suggests making the employer aware of the tax credits available to them when they hire Welfare-to-Work participants. Learn the process that an employer needs to go through to get the credit, then guide him or her through the process. Some questions to consider when looking to build partnerships with employers are:

- Can you pre-certify for the Federal WOTC/WWTC tax credits?
- Can you partner with the employer to help with job retention services?
- Can you recruit qualified candidates to fill vacancies, saving the employer advertising costs?
- Could you help the employer inform existing employees about services such as subsidized child care and medical benefits that would help with overall job retention for all employees?
- Can you offer a wage subsidy to the employer to offset the cost of additional training for someone otherwise not qualified for the position?
- Can you help the potential employer by linking him or her to resources in the community, such as tax credits and grants?
- Can you offer the employer customized training (soft skills as well as actual job specific, transferable skills) during which the beneficiary receives a "training wage"?

Essentially, it is important to be creative and flexible when marketing clients to employers. While it is important to try to work within the best interest of the employer, it should not be done at the expense of the client. If the employer cannot offer a reasonable pay rate, or is not willing to make necessary reasonable accommodations, a partnership with that employer may not be ideal.

The first step in marketing to employers, though, is reaching them. While "cold-calling" local businesses is an option, it is best to begin by assessing the skills of the clients along with the needs of the local labor market, looking for matches. Contact the State Labor Department to learn about average starting wages, growing industries, and any current vacancies. Other suggestions for reaching out to employers:

- Become a member of the Chamber of Commerce and attend networking events.
- Partner with other Federal and State agencies and seek their assistance in marketing to employers.
- Attend Business Expositions, renting space and setting up a booth if possible.

- Obtain endorsements from satisfied employers and use these in “advertising” material.
- Read the want ads and business section of the newspaper often.
- Learn who in your State offers grants to businesses, what businesses have been awarded grants, and for what.
- Learn what industries in your area are experiencing a high demand for labor and decide whether your clients could be a good fit.

After reaching employers, do not be afraid to negotiate for a higher wage or more flexible hours for working parents. Again, if the compromise does not work for both the employer and the client, it is not a true compromise. Also, be creative about tackling obstacles and barriers employment. For instance, Ms. Allen found a company willing to hire a group of her clients, but transportation and child care were a problem. Instead of turning down the opportunity, she found a licensed day care agency with vans, and contracted with the agency to meet the employees at a designated spot, transport the parents to work, then take the children to day care. At the end of the day, the process is reversed. It did take creativity, but in the end it worked out and 20 TANF recipients were employed.

7. MARKETING TO CLIENTS

Donna Campbell, Executive Director of the Connecticut Consortium for Women and Their Children with Behavioral Health Needs, addressed the issue of marketing services to potential clients.

The cardinal rule of marketing to clients is “never promise what cannot be delivered.” Before offering to help clients in any way, assess resources, capabilities, and possibilities carefully in order to avoid making empty promises. Ms. Campbell began by broadly defining social marketing as “the use of commercial marketing techniques to promote the adoption of a behavior that will promote the health or well-being of the target audience or of society as a whole.” The first step of social marketing is targeting the audience. At this point, it is crucial to get to know your audience—usually through interviews and focus groups. When conducting this research, listen carefully to what your audience is saying and base your marketing on their needs and suggestions. There are five main stages in any social marketing campaign: planning, message and materials development, pre-testing, implementation, and evaluation and feedback. Throughout each stage, it is crucial to focus on the audience and their needs.

The research conducted for the purposes of social marketing should answer five basic questions:

- What aspect of the problem will you address?
- What is the epidemiology of the problem?
- What can be done?
- What are the consequences?
- What knowledge, attitudes and behaviors are related to the problem?

Once these questions are answered, it is important to design an outreach strategy that focuses on reaching the target audience. The messages should be clear and consistent. Any newsletters or written materials should be interesting and easy to read. Door to door outreach may work well in with some populations as well. Throughout the entire process, a definite message of caring and respect should be conveyed—especially in the literature and media.

After the marketing is complete, and the program is underway, continual evaluation and monitoring of the outreach and communication processes are necessary. Continual focus groups and evaluation will lead to the overall success of program.

Emily Nelson, Department Manager for Health and Welfare Benefits Advocacy at Congresso de Latinos Unidos spoke briefly about marketing to clients. For their TANF compliance program, Congresso partnered with the Philadelphia Department of Public Welfare to do outreach to clients at risk of being sanctioned. The method used was not case management, but intensive outreach within the community. A two-person team made up of one member of the Latino community and one person trained in social services and TANF policy went to the homes of the families at risk. Each member of the team was both bilingual and bicultural. The team worked with the client to identify resources and steps to take to bring the family into compliance. Difficult cases with multiple barriers were referred to a TANF social worker, but the rest of the families worked with Congresso, meeting as many times as needed, until they were in compliance. In one year, 1200 visits were made and 82 percent of the families are in compliance. Ms. Nelson noted that the community was especially receptive to the home visits because they were made by people in the community who spoke the same language and had a similar background to the families. The lack of cultural barriers allowed the teams to work closely with the families, who trusted the members of the team.

This dynamic team model was so successful it is being replicated in other parts of Pennsylvania. The cost for the program came to about $200 per client.

8. CONCLUSION

The *Mid-Atlantic Peer to Peer Technical Assistance Workshop on Job Retention, Marketing to Employers, Strategies to Engage Clients* proved a success. Though a lot of information was packed into a full day, participants felt they walked away with good ideas for job retention strategies, marketing strategies, successful collaborations, simplified staff performance standards, and home visit models. Had more time been available, participants mentioned they would like to have spent it developing definitive measures of general success and job retention success. Also, they would like to have spent more time focusing on the issues facing both rural and tribal communities.

As TANF caseloads decrease, and the number of people moving from welfare to work increases, the challenge of job retention emerges. Job placement for TANF recipients is crucial, but these clients often require support services to continue working and obtain better employment. At this conference, job retention strategies and programs were examined. Experience has shown that clear, well-defined goals for case managers and clients is crucial to a job retention program's success. Finding jobs for welfare recipients can carry a stigma, but one that can be overcome—especially in a good economy. When looking for appropriate jobs for clients balancing childcare and transportation issues, creativity and negotiation with potential employers are keys to success. Marketing to clients can be just as challenging a battle. Often, clients do not want to deal with "welfare" offices at all after they have found employment. When planning strategies to enroll clients in job retention programs or services, understand that the welfare agency was not always viewed as an ally in the past. Above all, respect for the client is the most important element in any job retention program.

APPENDIX A

Mid-Atlantic Peer to Peer Technical Assistance Workshop
Job Retention, Marketing to Employers, Strategies to Engage Clients

United Way Building
Room 4
7 Benjamin Franklin Parkway
Philadelphia, PA
September 20/21, 2000

8:00 a.m. – 8:30 a.m.	**Registration**
8:30 a.m. – 8:45 a.m.	**Welcome, Introductions, and Workshop Overview** *Eileen Friedman, TANF/CC Program Manager, Administration for Children and Families* *Sharon Wellons, Welfare-to-Work Team Leader, Employment and Training Administration*
8:45 a.m. – 10:15 a.m.	**National Overview of Job Retention** *Anu Rangarajan, Senior Economist and Associate Director of Research, Mathematica Policy Research, Inc.*
10:15 a.m. – 10:30 a.m.	**Break**
10:30 a.m. – 12:00 p.m.	**Job Retention- One County's Experiences** *John Rodgers, Deputy Director, Planning and Evaluation Division, Riverside County Dept. of Public Social Services, California* **Job Retention - One State's Experiences** *Cindy Mund, Program Administrator, WorkFirst, Washington Department of Social and Health Services*
12:00 p.m. – 1:00 p.m.	**Working Lunch**
1:00 p.m. – 2:30 p.m.	**Marketing to Employers** *June Allen, Chief of Rite, Employment and Retention Services, Rhode Island Department of Human Services*
2:30 p.m. – 2:45 p.m.	**Break**
2:45 p.m. – 4:15 p.m.	**Marketing to Clients** *Donna Campbell, Executive Director, The Connecticut Consortium for Women & Their Children with Behavioral Health Needs* *Emily Nelson, Department Manager for Health and Welfare Benefits Advocacy, Congreso de Latinos Unidos*
4:15 p.m. – 4:45 p.m.	**Wrap-Up**

APPENDIX B

MID-ATLANTIC REGION
HHS-ACF/DOL-WELFARE-TO-WORK
"PEER TO PEER" TECHNICAL ASSISTANCE

Speakers List

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APPENDIX C

Mid-Atlantic Region
HHS/ACF/DOL - Welfare-to-Work

"Peer To Peer" Technical Assistance to Locals

Telephone
Listing

September 21, 2000

United Way
No. 7 Benjamin Franklin Parkway, Room 4
Philadelphia, PA 19103

MID-ATLANTIC REGION
HHS-ACF/DOL - Welfare-to-Work
"Peer To Peer" Technical Assistance

Conference Attendees

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APPENDIX D

WorkFirst Principles

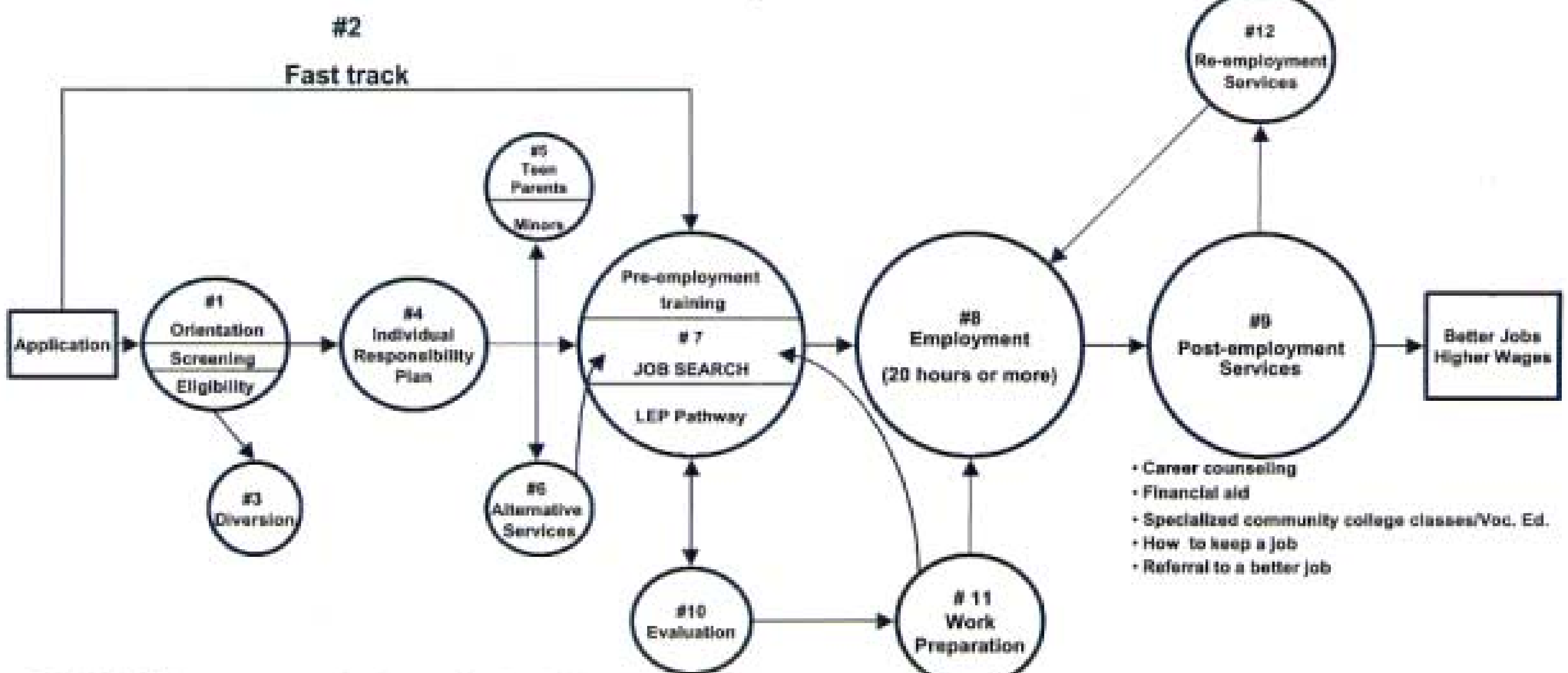
"A job, a better job, a better life"

1. Work is better than welfare. Work provides the best opportunity for families to raise their income and leave poverty. Those who work always have more income than if they receive only welfare.
2. Parents have the primary responsibility for supporting their children. Parents and the state share responsibility for helping families leave welfare. Parents are responsible for moving quickly into jobs. The state is responsible for helping parents find and keep a job, and for collecting child support.
3. WorkFirst participants who can work will immediately participate in job search or employment.
4. Support is available to help parents become and stay employed, for example health care insurance and childcare that parents can access and afford.
5. Help is available to low-income working families to lift them out of poverty and reduce their chances of going back on welfare. The state will offer education, job training and job-match services as routes to advance to better jobs.
6. WorkFirst participants who are unable to find work during job search will immediately participate in activities designed to help them become employable.
7. Those who won't participate in required job search or work-preparation activities will be sanctioned.
8. Legal immigrants are eligible for benefits at the same level as other residents of Washington state.
9. The four state agencies that share responsibility for WorkFirst will work with employers and other local partners to move families into self-supporting work.
10. The WorkFirst program will continue to change and improve through lessons learned and creative thinking.

APPENDIX E

WASHINGTON WorkFirst

Participant Flow



The WorkFirst program serves low-income families (with income at or below 175% of the federal poverty level) who receive TANF/SFA cash assistance. It also provides services to applicants and former TANF recipients to help them remain off assistance. Families who receive cash assistance must work, look for work or prepare for work or face financial penalties (called sanctions). This chart shows 12 stages in moving participants from cash assistance to self-sufficiency. Few participants will go through all 12 stages; our experience shows that they find jobs at any of the stages

- Subsidized employment
- On-the-job-training
- Community jobs
- Work experience
- Treatment counseling
- Training (includes Voc. Ed., ABE, ESL)
- Treatment/counseling/other special services
- Community service

Date: January 19, 1999