Second Interim Report for Housing Works: A Regional Workforce-Housing Alliance
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Executive Summary

Over the past year, the diverse partnership that comprises Housing Works (HW) has accelerated the implementation of this innovative program. This second interim evaluation report tells the continuing story of HW through a comprehensive examination of its partnerships, operations, successes, and challenges, as well as the early outcomes that are beginning to take shape.

Housing Works operates in the region encompassing Portland, Oregon and Vancouver, Washington. The program operates under a Workforce Innovation Fund (WIF) grant awarded in 2012 by the U.S. Department of Labor.

Program Objectives

Housing Works is a collaborative program that combines the resources of workforce investment boards (WIBs) and public housing authorities (PHAs) to provide public housing residents with intensive training and support to help them obtain the work credentials and experience needed to enter high-demand industries (construction, health care, manufacturing, and office work). This combination of training, experience, and support is expected to lead to higher income and reduced or eliminated dependency on housing authority rental assistance. The core components of Housing Works include vocational case management, career and resource planning, career pathways trainings, job preparation, and job-attachment services.

The HW program has four overarching goals:

- **Increase the collaboration between the HW region’s WIBs and PHAs** through the execution of formal agreements that dedicate ongoing resources to coordinate co-funded services and through purposeful policy alignment that reduces barriers to partnership over time.

- **Increase the efficiency of the region’s WIB and PHA services** by co-investing resources in the public housing resident population with the shared goal of eliminating program redundancies and increasing resident employment.
• **Increase the earning potential of public housing authority** residents by improving their access to and retention in training services linked to high-demand occupations.

• **Accelerate a path to self-sufficiency for public housing authority residents** through the attainment and retention of employment in high-demand occupations with pathways for advancement.

One of the most important distinguishing features of the HW model is the intensive support provided by a vocational case manager (VCM). In three of the four participating counties, the VCMs are PHA case managers who work closely with a WIB liaison to coordinate training, work experience, and support services for participants.¹

### Research Questions

Most of the research questions posed in the evaluation design report are addressed in this second interim report, at least preliminarily. Appendix E provides a full list of the research questions that have guided evaluation activities from the outset. The subset of research questions that are addressed in this report fit within the following general categories:

- **Implementation study: program activities.** These questions address the extent to which the program is being carried out as planned, the systemic changes that are occurring across the partners as a result of the program, and the use of data to guide decision making. Additional questions address the following:
  - Efforts to identify and address systemic policy and process barriers or unintended consequences
  - The nature of and reasons for deviations from the model
  - Lessons learned from program implementation that could have implications for similar programs
  - Program sustainability, including the identification and elimination of program redundancies, and the identification and use of leveraged resources to implement the program

- **Impact study: program outputs and outcomes.** The findings in this category continue to be preliminary, as most participants have not completed the full

¹ In the fourth county, vocational case management is provided by a separate entity within the same governmental division as the PHA, rather than by a PHA staff member.
program. Relevant impact study research questions are concerned with the following:

- The extent of participation in HW job services, training, and job attachment
- Participation in WorkSource workshops and services
- The value, effectiveness, and benefits of the services to participants

Key Findings and Implications

Partnership and Collaboration

The collaboration remains strong and is well represented by the key stakeholder groups.

- The support offered by the grant management and communication structures should be continued to aid the partners in ongoing implementation and coordination of the program.

The partners have discovered that leveraging resources, such as child care and transportation, is critical for participant success.

- The partners are expected to continue to identify opportunities to reduce silos and find integrated approaches to service delivery.
- Successes and challenges in alignment endeavors are likely to be closely watched by outside parties for lessons to apply to other systems alignment.

There is very strong interest in sustaining the collaboration, and partners have begun to craft plans for partnerships beyond the grant, which will continue work across the housing and workforce systems. Nonetheless, partners question the feasibility of continuing to carry out the HW model without significant additional grant resources.

- An immediate challenge is to envision the multiple potential paths for the partners to continue to carry out the model. This includes determining the feasibility of a post-grant scenario in which each partner invests routine HUD and WIA formula funds.
- It is urgent that the collective continue to focus diligently on the issues of sustainability.
Program Implementation

Enrollment has occurred less swiftly than originally planned, standing at about 60 percent, instead of 100 percent complete as planned. Enrollment has been slowed by challenges in the hiring and retention of VCMs. Furthermore, the enrollment target has increased due to a decision to apply the target to the number of active participants, rather than those who are technically enrolled.

- A no-cost extension of the grant would be helpful; it would allow more time to reach enrollment targets, and help ensure that more recent enrollees have time for training, placement, and/or follow-up.

- A longer enrollment period, however, can negatively affect the outcome analysis, due to a smaller window of time to observe the progress of some participants, and a less statistical power for estimating program impacts.

- Regardless of an extension, partners should enroll all the remaining cohorts as promptly as feasible, to minimize these limitations.

In the past year, the partners began to implement more earnestly a cohort approach that involves keeping participants together in a cohesive group, ideally from recruitment to completion. Because the partners are at different stages in their implementation of this approach, it is premature to draw definitive conclusions about its effectiveness; however, it appears to have helped improve participant perceptions of the clarity of communication at orientation, compared to feedback from the prior year. Interview responses suggest that the cohort approach is believed to more effective than the prior, more open waves of enrollment.

- Continuing this approach may result in greater ease in the logistics of training, and improved communication and engagement of participants.

Participants provided positive feedback about their early-stage experiences in the HW program. Compared to the prior year, satisfaction has increased on many indicators. Satisfaction with enrollment overall is high. Some sites managed to streamline the enrollment process, but further efforts would require high-level policy change.

- The burdens related to eligibility documentation remain higher than necessary. Further changes will require greater alignment of systems, which may be beyond the purview of the HW program.
Services

Participants report that the early-stage services, i.e., career mapping, career and resource planning, and Career Link, are highly useful in helping them learn more about careers in their industry of interest, identify and set goals, and learn the steps they need to take to stay on track with their progress. Early in the program, most participants expressed confidence in their ability to overcome barriers with the help of the program. Very preliminary data suggest that participants may be slightly less enthusiastic about the program at exit.

Continuous adjustments and enhancements to career preparation components have resulted in impressive improvements in participant feedback on many dimensions, compared to the prior year, including the ability of Career Link to convey an understanding of real career opportunities.

- Career mapping and Career Link components should be further scrutinized to identify—and, where feasible and reasonable, to eliminate—redundancy with other services provided to participants.
- For participants who have had pre-grant job-preparation workshops that make program requirements appear redundant, the team should assess opportunities to make the experience more palatable or flexible.

Efforts to clarify the central role of training and education in the program and the expectations of participants have been largely successful.

- Additional communication tools are needed to convey the importance of proactively dealing with a criminal history, and to help participants understand how this could affect their choice of jobs to pursue.

A core component of the model—the individualized approach to participant plans, resources, and ongoing support—is critically important for success.

- Maintaining a ratio of 1:30 will be essential to permit the desired level of individual support.

Liaisons and Case Managers

The WorkSource liaison role is a highly valued and successful component of the program. In spite of significant turnover, liaison services have continued to be effective and well regarded.
It is vital to hire liaison staff who are already exceedingly skilled and knowledgeable about workforce services; their orientation to the HW model of coordination then becomes the key training needed for the position.

A solid relationship between the liaisons and VCMs is indispensable for effective mutual support of the program participants.

The frontline teams should be encouraged to continue forward with the patterns and modes of communication and relationship building enjoyed to date.

A strong majority of participants considered their case management highly effective at the start of the program. Very preliminary early exit survey results suggest there may be a decline in this percentage at the time of exit. Focus group responses indicate that VCM turnover is problematic, and that effective case management is linked to active engagement.

Future exit survey results will be key for assessing changes in participant opinions of VCM effectiveness. In the meantime, program managers should work diligently to ensure that gaps in case management are filled quickly.

In most sites, the number of vocation-related case management contacts did not reach the intended goal. Instead, the number of contacts appeared to be personalized according to participant needs and stage of learning, and most participants were satisfied with the amount of contact they received.

While the target figure of ten vocational contacts per quarter appears useful as a general guideline, VCM contacts should continue to be adjusted as needed to ensure that participants are guided through the program effectively, and that VCM time is used efficiently.

**The Future**

As the second year of Housing Works draws to a close, the evaluation findings continue to indicate that the program is being managed effectively, has been proactive in identifying and addressing challenges, and has largely maintained fidelity to the Housing Works model. Where deviations from the model have occurred, program organizers have been diligent in justifying and documenting the changes.

Communication, participation, and investment among the partners have remained very strong. As the program approaches its conclusion, it will be very important that the partners continue the momentum toward fulfilling the enrollment targets, and
providing a greater number of training and job-placement opportunities. The other key focus should be to assertively push forward on resolving as many regional system alignment gaps as feasible and to determine the level of co-investment of resources needed to sustain the core program components in future iterations of the model.
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Overview

This is the second in a series of interim reports providing evaluation findings for the Housing Works (HW) program funded through the Workforce Innovation Fund (WIF). HW prepares public housing residents for employment in the high-demand industries of manufacturing, health care, office work, and construction. The program builds on prior evidence of success and is being implemented in Clackamas, Multnomah, and Washington counties in Oregon and Clark County in Washington. A core partnership of three workforce investment boards and four public housing authorities conducts these efforts and Worksystems, Inc. (WSI) serves as the WIF grant leader and administrator.

The program’s goals are to increase employment income and empower participants to consistently earn a living wage. Partners also seek to create system changes across the partnership by aligning policies and fostering the co-investment of resources. It is anticipated that these efforts will reduce redundancies and create efficient and relevant services that improve the employment outcomes for program participants.

Program Objectives

There are four overarching objectives of the HW program.

1. Increase the collaboration between the HW region’s WIBs and PHAs through the execution of formal agreements that dedicate ongoing resources to coordinate co-funded services, and through purposeful policy alignment that reduces barriers to partnership over time.

2. Increase the efficiency of the region’s WIB and PHA services by co-investing resources in the public housing resident population with the shared goal of eliminating program redundancies and increasing resident employment.

3. Increase the earning potential of public housing authority residents by improving their access to and retention in training services linked to high-demand occupations.

4. Accelerate a path to self-sufficiency for public housing residents through the attainment and retention of employment in high-demand occupations with pathways for advancement.
The HW program offers unified, seamless service delivery to participants where training and employment services are delivered using a case management approach tailored to the needs of individual participants. Service components include access to case management, life skills training, career and resource planning; ongoing access to career pathways; trainings linked to high-growth industries; job preparation; job-attachment services; and employment-retention services. Systems change is addressed through core program components including growing organizational capacity to more fully align resources and policy, co-investment of resources, and unified seamless service delivery.

Program Evaluation

The evaluation is two-pronged, examining both the implementation and the impact of the program. It is designed to yield meaningful answers to a set of research questions about program implementation and impact, and to generate data that can support decisions about program improvement, expansion, and replication. This document presents findings and lessons that primarily cover implementation challenges and successes and the fidelity of the implementation at the close of the eighth quarter of the WIF grant period.

The findings in this report focus primarily on lessons learned in the second year of the program, specifically highlighting the program as experienced by staff, partners, and participants from July 2013 through June 2014. Nonetheless, unless otherwise noted, the early-stage participant survey results are aggregated from all waves of data collection, which began prior to July 2013.

The primary data for this report were obtained through two site visits, and included key stakeholder interviews and participant focus groups conducted in 2014. In developing findings and conclusions, the evaluation team also relied on recent administrative data and drew upon all data streams available through June 2014. The evaluation methodology is summarized in Appendix E.

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2 Data streams included five site visits, multiple rounds of interviews with program staff and partners, early-stage participant surveys, exit-stage participant surveys, employer surveys, two rounds of focus groups with participants in each site, and program and administrative data.
Organization of the Report

The topic of each chapter and the research questions addressed within are listed below. The complete list of research questions is available in the evaluation design report.

- Partnership and collaboration
  - Implementation research questions 3, 4, 5, 8, 10, 12a, and 14
- Program implementation
  - Implementation research questions 1, 2, 6, and 7
  - Impact research question I-7
- Services
  - Impact research questions I-1a, I-1b, I-2, I-7, I-10, and I-11
- Liaisons and case managers
  - Implementation research question 7
  - Impact research question I-7
- Lessons
  - Implementation research questions 9 and 11
  - Impact research questions I-9 and I-11

As in the first interim report, each chapter is organized such that key findings are definitively stated as a second-level heading, with supporting evidence summarized immediately thereafter.

The appendices provide a finer level of detail. Appendices to this report include:

- Fidelity Scores
- Enrollment and Services
- Participant Survey Results: Early-Stage Participation
- Participant Survey Results: Exiting Participants
- Methodology
Partnership and Collaboration

This chapter addresses the collaborative efforts undertaken by the key stakeholders of the HW initiative. The findings and discussion explore the functioning, strengths, challenges, and capacity of the collective to achieve program goals.

The following research questions address the collaborative aspect of Housing Works:

- **Collaboration.** To what extent were workforce investment boards (WIBs), public housing authorities (PHAs), community colleges’ adult basic education programs, employers, and others involved in devising and implementing HW? How did these contributions work together to support HW? Were there any gaps in the partnership?

- **Structure.** Does the partnership between the local WIBs and PHAs help achieve the program’s goals?

- How did WIBs and PHAs apply lessons learned from data analysis to decision making about HW as it happened?

- What systemic changes occurred:
  - Across the PHAs? Across the WIBs? Between the PHAs and WIBs?
  - How were any such changes achieved?

- Did county alliances identify systemic policy and process barriers to successful collaboration (at the agency, local, state, or national levels) during the course of the program? If so, did they collaboratively develop solutions to those barriers? If not, why not?

- Were the systemic and service enhancements of HW a cost-effective model for increasing the participants’ abilities to obtain long-term employment? Specifically: What program redundancies were identified, and which of these were eliminated?

- How did PHAs leverage other resources to implement HW? What effect did those resources have on the success of the program? Did the effect vary by type of funding stream?

- **Sustainability.** How will HW be sustained after the conclusion of the grant period?
The Collaboration Remains Very Strong and Viable

The relationships between the partnering entities and the structures created to support the collaboration have a strong foundation, have been energetically maintained, and hold promise for future work together.

Evidence

Based on multiple site visits and over 100 interviews since the inception of the grant with multiple levels of staff in partnering organizations, it is clear that the collaboration among the HW partners, which started off strong, has continued on a positive trajectory. The collaboration is characterized by—and is highly functional because of—adaptability, mutual trust, and consistent investment. The right people are in the collaborative and are actively participating. One partner contrasted the high level of involvement with other partnerships in the past: “I don’t think I’ve ever seen us involved in a collaborative effort where we’ve had so much involvement by all the partners. . . . [We are] on track because everybody has been on top of it and monitoring consistently.”

The high quality of the grant management team has been a tremendously constructive influence. At the hub of the group, the management team has maintained a consistent focus on the grant goals, provided thorough communication with all partners, and been an active problem-solver. Partners described WSI as receptive, knowledgeable, thoughtful and clear; one partner described the management as “very good about monitoring the program and they give us feedback . . . they are really paying attention to the program.” Nonetheless, some frustration was expressed over the frequency with which program process and policy has changed. One partner noted that not a month had gone by without a change, although, “the good thing is they are always open to feedback.”

Aside from the PHAs, WIBs, and WorkSource (WS) centers, other parties have added value to the program. Vendors of high quality and adaptability were perceived to be extremely helpful. Examples include the community college with a CASE grant, and training providers who changed their schedule format to meet the learning needs of the HW participants, for no additional fee.
There have been few barriers to the collaboration. One was understanding the context of each other’s systems, such as regulations, priorities, and operational constraints. Accordingly, a key task for the stakeholders was to grasp both this basic understanding and the implications for other stakeholders’ roles in the program. The partners approached this issue with energy and motivation. The solutions were to develop relationships, communication modes, and relevant workgroup structures, all of which have been critical and worthwhile for building this understanding. Opportunities for communication were needed and created at all levels: executive, management, and frontline.

Despite these efforts, understanding and working across systems has been somewhat challenging. Some frontline staff noted the importance of not just understanding a system in theory, but how it operates in terms of its customer interface. One VCM suggested that, “[The HW participant] is totally different than the standard walk-in person [going into a WS center].” Another VCM illustrated this point with an example of an apparent difficulty penetrating the WS center. In this example, a participant could not get to the intended WS registration process; WS staff not familiar with the HW program tried to route her in the wrong direction. On her third separate attempt, even with the liaison accompanying her, it was difficult to dissuade WS staff from sending the participant in an inappropriate direction.

During the grant period, there has been turnover in executive-level staff at several partnering entities, but, remarkably, there have been no negative effects on the collaboration due to this turnover. A barrier faced by three of the four PHAs, however, was the turnover in VCM staff. This created significant challenges for each in-house team, an issue that is addressed in other sections of this report; it has not impaired the collaboration across entities.

As noted, the grant management and other key stakeholders have applied a good deal of energy to monitoring the grant. Moreover, they have adeptly used data systems to inform decisions on programmatic issues. They have used administrative data to assess their performance and integrated evaluation feedback into their assessments. There have been a series of relatively minor process and policy adjustments. The two most notable changes were to occupational coaching and long-term basic skills. Both are discussed in the Implementation chapter of the report.
The Structure of the Collaboration Supports Goal Attainment

The vehicles for maintaining the collaboration—County Alliances, Regional Alliance, and other workgroups—are highly functioning, bring in the right parties, and offer valuable platforms for maintaining relationships, exchanging information, and achieving program goals.

Evidence

The collaboration operates in large measure through a series of workgroups, each of which offers significant opportunity for partners to exchange information and solve problems. In addition to the key groups originally envisioned and currently functioning—County Alliances and the Regional Alliance—the partners also participate in an Implementation Team. Meeting quarterly, this was an adaption based on the emergent need for frontline staff, including VCMs, liaisons, and program managers, to share their successes, challenges, and best tools for program implementation. Staff report that this communication channel has been helpful and that its value has grown as the format evolved to allow for deeper exchanges among individuals in similar positions. The value of the interactions was captured by one VCM who said, “It’s nice to hear from other people who are having similar struggles. . . . [We talked about] new ideas and approaches. . . . I got a few good ideas from the last meeting. Good information to bounce off other people.” This and other workgroups have been appreciated means for identifying and moving through potential and actual roadblocks.

Partners’ ideas for further improving the implementation team meetings included pulling together the liaisons and job developers into closer dialogue; doing so would allow them to bring in more real client examples and share the status of those cases over time.

Regional Alliance

The Regional Alliance (RA) has continued to meet on schedule and bring together as planned both executive and program management staff from partnering organizations. Virtually all partners interviewed during the most recent site visit said that the Regional Alliance was on the right track to accomplish its goals. A tone of cautious optimism was common, as exemplified by one RA member who said, “We are definitely on the right track. Can all goals be accomplished? Don’t know, but it would not be for lack of effort.” The stakeholders recognized significant barriers to accomplishing final goals. These included concerns about policy disincentives to work, the length of time required
to make systems changes, the siloed approach of agencies like the Oregon Department of Human Services (DHS), and that the power to make system changes resides at a higher level than the Regional Alliance.

“We are definitely on the right track. Can all goals be accomplished? Don’t know, but it would not be for lack of effort.”

The RA as a whole is responsible for promoting sustainability, and appears to provide a great deal of energy and support to this end. The tasks of the Regional Alliance are delegated to workgroups. To date, the Systems Alignment Workgroup has been a primary driver of action. Another planned group, the Resources Workgroup, had originally been envisioned as operating simultaneous to the Systems Alignment Workgroup. As the tasks for the workgroups were developed, however, it became clear that their work needed to be sequential rather than concurrent, since co-investment and identification of other resources must follow a collective vision of alignment. The work being done within the RA meetings is seen as fostering individual and collective effort; the group provides a common and shared agenda across entities.

The RA members participated in a facilitated thought exercise around systems alignment. This input aided the Systems Alignment Workgroup to develop a white paper that summarized the barriers and opportunities to achieving the goal of alignment across systems and provided policy recommendations at the local, state, and federal levels. The white paper provided an agenda for further work, having identified policy issues to be addressed within the context of the HW collaboration. The results were also re-crafted into a document for the United States Department of Labor (DOL) that recaps several issues and the potential policy solutions.

At the most recent RA meeting, it was decided that the white paper was an appropriate vehicle for reaching other parties with the group’s recommendations. Executive level staff were charged with sharing the white paper with other state and federal agencies, particularly Oregon DHS and U.S. Department of Housing and Urban Development (HUD). All partners are expected to continue internal analysis regarding how to implement the recommendations regionally. As a notable exception to the typical clear communications across the collaborative, only a few of the partners who attended the recent RA meeting were clear about the next steps to be taken.

County Alliances
In interviews, the partners indicated that the County Alliances brought the right partners into the collaboration. The original intent had been to include employers in
County Alliance meetings, but as the work unfolded, it became apparent that it was not necessary to do so; WIBs provided a proxy for the employer perspective without imposing additional burden on the employers. The staffing level, format, and frequency of meetings vary across counties, but each includes the appropriate parties to move program implementation forward in that county. For instance, in one county the meetings are held more frequently than originally planned and with a smaller group than had been assembled initially. The group now includes a small core consisting of an executive-level WIB person, a WS WIA training lead, and the PHA program manager. Other parties are brought in periodically as needed, rather than routinely. In that particular county, other communication vehicles are also used; for instance, the VCMs, liaison, WIA training lead, and job developer meet monthly to review cases.

The County Alliance meetings are touted by partners as very effective vehicles for communication across partnering organizations within each county. The meetings were described as critical for problem-solving around service delivery and connecting program components. Performance review has been a consistent agenda item at each site. The sharing across partners was deemed “invaluable” for understanding what is working and not working, and the forums have been particularly useful to ameliorate the challenges of staff turnover. Additional information on the relationships between VCMs and liaison staff is discussed in more depth in a separate section of this report.

Industry Panels

Convening of region-wide industry panels is within the purview of the Columbia-Willamette Workforce Collaborative (CWWC). Each industry panel is charged with developing an industry-specific workforce plan. The HW initiative relies on this existing WIB collective, which pre-dates the HW grant, rather than duplicating efforts by creating a separate employer engagement strategy.

The CWWC and its industry panels help HW connect to employers in several ways:

- Career Link (CL). Career Link is the only facet of CWWC that is HW specific, and it evolved from a model for the long-term unemployed. The WIB industry lead brings together employers and human resource representatives to identify essential skills for targeted occupations and then shares that input with the CL team. This process helps ensure that CL course content reflects industry-specific, skill-building activity established by employers.
• Presentations and tours. Employers have also been engaged by CWWC to participate in the CL as presenters and site tour hosts. This was valuable for the staff who organized the CL classes and needed help connecting to employers. Feedback from participant focus groups and surveys indicate that interactions with actual employers are valued for increasing ones understanding of the industry.

• Job attachment. The CWWC engages employers for job attachment. The WS job developers help match the HW participants to employers.

The HW leadership envisions HW participants becoming part of an emerging regional sector-based labor pool. To date, the industry panels and the related efforts have unfolded more slowly than CWWC had planned. They have been working with the manufacturing sector since 2012, and they have an entry-level manufacturing credential, the certified production technician (CPT), offered through the Manufacturing Skills Standards Council. The health care industry efforts have been more difficult to establish. Viewing the industry as having several subsectors has helped move their work forward, resulting in developing a long-term care panel of 23 employers. Having gained some traction in marketing manufacturing and long-term care to attract talent, the next goal planned is to improve retention.

Leveraged Resources are Critical for Success

The partners have managed to leverage in-house and external resources to reduce the duplication of services and to better support participants.

Evidence

The PHAs continued as planned to provide their grant resource match via housing subsidies and case management services, and they have exceeded the threshold match due to the volume of participants and their dual enrollment in multiple PHA programs. Home Forward put forth $150,000 as new additional leverage for the grant, having determined that more supervision was needed. The WIBs continued successfully to find WIA funds for HW participants. The WS centers now accept Career Link in lieu of other classes to fulfill requirements for WIA.

Partners are motivated to find opportunities to increase their leverage. Partners have been able to leverage in-house resources, to create efficiencies for themselves, reduce redundancy, and enhance opportunities for customers. The key example of this is the
close working relationships between HW and Family Self-Sufficiency (FSS) case managers within an agency. The FSS and HW programs are cross-promoted to residents and resources coordinated for maximum impact for the client. In some sites, the case reviews are effectively combined, such as quarterly reviews of cases involving VCMs and PHA residential services staff.

Outside resources are also being leveraged effectively. A good example of this is access to the Oregon Department of Human Services (DHS) support services, in particular child care and transportation, which are deemed critical for accessing occupational training opportunities. As noted, the partners are leveraging their experience collaborating together in HW to apply for other grant opportunities and create broader engagement strategies.

In terms of redundancy, customers with an interest in multiple programs at various agencies—e.g., Oregon DHS, WorkSource—will find that each agency requires its own enrollment and therefore registration becomes a redundant process. More collaboration across non-HW agencies would help avoid this burden; such a change would be consistent with an existing initiative by the governor of Oregon that encourages reduction in silos.

One promising approach to reduce duplicate contact with employers is Connect to Careers (CtC). This is a clearinghouse for placements (unsubsidized placements, OJT, and internships), which is not an HW-specific product, but is available for HW participants in Multnomah and Washington counties. This is an integrated approach to placements, using a common infrastructure to reach out to employers. It offers a more stable way to deliver services than creating internships through every center or approaching employers with each individual initiative.

**Sustainability is Highly Desired, and Planning is Underway**

The partnerships are on a solid path forward for continuing their collaboration. However, the scale of the model that can be carried out in the future is uncertain and will be dependent on the application of resources and evidence of outcomes.
Evidence

Interviews revealed a consensus among partners that the program model has value and can be continued post-grant in some fashion and at some scale. As noted by one partner, “We all agree this is very valuable and would love to continue it in some way.” Partners have been pondering the scale that would be feasible for continuing the HW program, and identified funding as a key constraint. One stakeholder captured the sentiments of many, saying, “Without additional funding, it would be a scaled down version of the program.” One partner voiced the singular pessimistic view that continuing to apply their resources at this level was “wishful thinking at this point.”

There is consensus that the partnerships themselves will continue to operate regionally, and that competitive grant resources will be sought to continue the work. There are several examples of partners collectively pursuing other funding, in order to integrate the HW model or components of the model in future plans. For example, in the Ready to Work proposal, the Veterans Health Administration committed to providing short-term housing dollars to the long-term unemployed as leverage for the grant. Two partners are also moving forward with co-location plans, to better serve common customers.

The collaborative work has been intended as a co-investment, which is why the match was required for the HW partners. In this light, sustainability means that partners would continue to leverage regular HUD and WIA formula funds to deliver services, in an aligned, non-duplicative fashion. Ideally, the staff would be leveraged as well. It is not desirable to have new, temporary staff for each grant, but rather, that permanent staff become familiar with the model and able to implement this in routine ways. Each partner is beginning to consider how feasible this is to enact within their own unique budgets and configurations. The PHAs are looking at various future scenarios to integrate vocational case management services into the daily operations of their work.

The Regional Alliance Resources Workgroup has been charged with furthering the dialogue on system alignment and co-investment. An indicator of sustainability is when the strategies of the innovative model become routine ways of doing business within the system. This means that post-grant, for example, the case managers understand how to access the workforce system, and have tactics for working in the WS centers. Similarly, the workforce products and services are effective for highly barriered housing residents, and the centers would be motivated to serve this audience. One partner noted that each county alliance “will be a strong factor in sustainability… a really strong building block.”
Contextually, HW is one of many influences to promote the idea of a significant shift toward systems alignment. The program is an outcome of prior efforts to align systems in the region, but it also continues to inform a model of systems alignment. The HW model is an example of the type of collaboration envisioned by the Oregon Governor’s Initiative to Create Work Ready Communities. The program can bring to light both the successes and challenges of a collective effort across multiple systems to address complicated needs.

Partners agree that the potential for fully enacting the HW model, post-grant, will also depend on evidence of positive outcomes for the participants, as it should. Several stakeholders pointed out that a no-cost grant extension of 6 to 12 months could provide the time needed to identify both funding and reliable evidence.
Program Implementation

The current state of program implementation is presented and discussed in this chapter. Included here are findings related to the front end of the program—recruitment, orientation, and enrollment—as well as participant satisfaction with program components, and fidelity to the program model.

The research questions relevant to program implementation include the following.

- To what extent was fidelity to the model maintained at each of the four sites and across the sites? What site-specific adaptations were made and why?
- Did the program unfold as planned and on the intended timeline?
  - If it did not, in what ways and for what reasons did it diverge?
  - To what extent did program leaders believe that the changes increase or decrease the likelihood that the original goals of the program would be achieved?
  - Did the program operate at a scale sufficient to meet its estimates for program outputs and outcomes?
- How was the plan to provide very low-income families with access to training and employment programs communicated to stakeholders? To what extent were the communications sensitive to cultural and economic differences? Did the approach to communications promote stakeholder buy-in?
- How did participants rate the value and effectiveness of the services they received?
- In what other ways did employers and job seekers benefit from HW?

Enrollment Targets Proved Difficult to Meet

The key contributing factors in not meeting targets by May 2014 were high turnover in VCM positions, especially for the one county with the highest target for enrollment, and a revised definition of participation.

Evidence

The original program plan called for enrollment to be completed by May 2014. By June 2014, only one site had reached its target. On the whole, the program had only reached
77 percent of its original enrollment target. The site farthest from its goal had the largest target; 165 were enrolled of 270 intended.

Not only is the program not near its enrollment target, but there are actually two factors that have, in a sense, increased the denominator—the enrollment target—beyond that originally planned. First, one site had increased its target enrollment goal by 50 percent, from 50 to 75 participants, because they had sufficient resources to do so. Second, the definition of participation—which is discussed more thoroughly below—was adjusted by the leadership, when it was discovered that a large number of the earliest program exiters were not actively engaged in the program. A distinction was made between those simply enrolled, and those actively engaged (i.e., completed Career Link, at a minimum). The partners are determined to reach the targeted numbers, not just of enrollees, but of active participants. With these factors in mind, the progress toward the enrollment goal is not the superficial 77 percent, but a meaningful 60 percent complete. As of June 30, 2014, 370 participants had been enrolled, of which 66 had been disengaged, and the program needed 201 additional active participants to reach the final enrollment goals.

![Figure 1. Progress Toward Updated Goals for Enrollment of Active Participants](image)

Another factor that has slowed the pace of enrollment during the course of the program from its inception, as mentioned in prior reports, is the unforeseen consequence of maintaining a 1:30 ratio of VCMs to participants; one cannot rush through hundreds of participants in a short time frame, and still cap the ratio at 1:30, with a finite number of VCM.
Despite obstacles to meeting enrollment targets, the partners have readily found sufficient numbers of individuals interested in the program. By late 2013 and early 2014, wait lists had formed for several of the PHAs. For example, Home Forward had a wait list of 50 to 60 individuals in January of 2014. But by June 2014, the wait lists were reduced or eradicated across PHAs.

This ability to work through the wait lists was due to an increased emphasis on the cohort approach; increased availability of VCMs (as former participants exited or were deemed disengaged); and the filling of open VCM positions. It appears that word of mouth and increased trust in the ability to deliver on program goals have played a part in gaining interest of housing clients. One of the sites promoted the program using a dedicated Web page (http://www.clackamas.us/housingauthority/housingworks.html).

Early in 2014, program policy was changed to constrict eligibility to include only individuals who did not need long-term basic skills training. Individuals who need long-term basic skills will no longer be enrolled because there is not enough time for both remedial work and the other program components. Even with this constraint, there has been no lack of individuals interested in the program.

Nonetheless, new strategies are being considered to continue to find interested individuals. One site is considering targeting sub-populations such as young adults who are living with a parent, those within a single housing project, or members of a tight-knit group of individuals with a current shared interest, e.g., exercise group.

The Increased Emphasis on a Cohort Approach to Training May Help Participants Understand the Program and Streamline Their Work

Some of the partners have created a series of opportunities to clarify—in recruitment, orientation, and intake—the nature of the HW program to more fully emphasize training and skill enhancement as key program goals. This appears to be contributing to a better understanding by participants, and in improved ability to counsel and train participants.

Evidence

In the past year, one of the PHAs shifted to a cohort approach to training, where each wave of participants was recruited for training on a particular sector or career path, or a
specific type of job. These participants would then go through the Career Link and training process together as a group, creating an atmosphere of mutual support, progression, and camaraderie. The other three partners are in the early stages of implementing this model in their service areas—e.g., by making logical groupings of existing participants to go through the same types of training together. Another variation of this is where PHAs are recruiting among already enrolled participants for training within two industries (e.g., office work and health care) where there is notable cross-over in work environment and soft skill elements. Because not all partners were making full use of the cohort approach at the time of data collection for this report, the findings in this section should be considered preliminary.

Partners reported in site visit interviews that this cohort approach has been more fruitful than the previous, more open waves of enrollment; the latter had permitted much too broad a range of job positions to effectively counsel and train as a whole. The cohort approach seems to have simplified some of the logistics of training, offered intentional techniques to engage participants, and increased the opportunity for peer-to-peer support.

The cohort approach appears to be more fruitful than the previous, more open waves of enrollment

Along with recruiting for cohort-based training, partners made adjustments to help potential participants better understand the training and cohort aspects of the program; the readiness interview was adjusted to allow more open-ended assessment of barriers, and the orientation was revised to emphasize training. Partners also felt that the approach and clarifications have helped participants have a more clear understanding of the program.

At this writing, there is not enough information to attribute definitive results to the shift toward the cohort approach. However, survey results appear to corroborate the partners’ perceptions. As shown in the chart below, participant perceptions of the sufficiency and clarity of information shared at orientation were positive. Furthermore, all four indicators in the chart have improved, compared to feedback from the earliest waves of participants. For example, the item regarding having a clear picture of HW and the item regarding clarity in the time and effort required of participants had each increased approximately 9 percentage points from the prior year.

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3 As reported in the first annual evaluation report of Housing Works.
In the early stage survey, participants provided feedback in their own words as to how orientation could be improved. Considering only the responses collected from July 2013 through June 2014, 41 percent of those responding to the survey offered suggestions on orientation. Nearly all responses could be coded into the following themes:

- **Information:** More than half of the ideas put forth pointed to a need for more information; more explanation, repetition, or slower presentation of information; or more clarity regarding the program model, training, and expectations of participants. There were a few comments that the program components had been misrepresented.

- **Structure of the meeting:** Participants would have preferred more time, more one-on-one sharing of information, fewer presenters, more accessibility for those differently abled, and child care.

- **Logistics:** Suggestions focused mostly on the need for alternative times and locations, and there were a few mentions of providing food at the meeting.
Participants Continue to Have a High Level of Satisfaction with the Enrollment Process

Participant survey results provided positive feedback on several facets of the enrollment process, along with overall satisfaction with enrollment.

Evidence

As the chart of survey results below highlights, participant feedback regarding enrollment was fairly positive. More than three-quarters of participants perceived that the enrollment process was easy and was clearly explained. Compared to the earliest waves of participants, there was an increase of about 7 percentage points in the proportion who said the enrollment requirements were clearly explained. Participant survey results show that the overall satisfaction with enrollment remains unchanged at 94 percent.

Efforts to streamline enrollment were undertaken in some locations in the past year. At the outset of the program, participants were required to provide eligibility documentation at multiple points, i.e., to enter into HW and WIA services, and more, if entry into the PHA service is taken into account. Two of the sites changed practices to ensure that participants could be enrolled in both the HW and WIA in a single shared site within one day. Nonetheless, these efforts have not shifted the survey responses—compared to last year—in terms of trouble getting the right documentation. About one in five participants still found the enrollment process too lengthy or said it had too many steps. Partners remain concerned and detailed the issue of repetitive eligibility documentation in their white paper.
Participants Have a High Degree of Satisfaction with the Housing Works Program Overall

Participant survey results regarding the overall satisfaction with key components of the program were very positive.

Evidence

Results from the early-stage participant survey shown in the chart below highlight the overall satisfaction with the program. Compared to feedback from the earliest waves of survey results, participant satisfaction with Career Link increased about 4 percentage points, up to 91.7 percent; and overall satisfaction with HW increased to 88.4 percent. For each of the satisfaction items in the chart below, the percentage of those very dissatisfied dropped compared to last year.

Figure 3. Participant Perceptions of Enrollment

<table>
<thead>
<tr>
<th>Perception</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment in the Housing Works program was easy.</td>
<td>82%</td>
</tr>
<tr>
<td>The Housing Works program requirements were explained clearly at enrollment.</td>
<td>76%</td>
</tr>
<tr>
<td>Enrollment had too many steps.</td>
<td>23%</td>
</tr>
<tr>
<td>Enrollment took too long.</td>
<td>19%</td>
</tr>
<tr>
<td>I had trouble understanding what I was enrolling in.</td>
<td>15%</td>
</tr>
<tr>
<td>I had trouble getting the right documents for enrollment.</td>
<td>10%</td>
</tr>
</tbody>
</table>
At exit, however, only 12 of 19 recently exited participants expressed that they were satisfied or very satisfied with Housing Works overall (63 percent). This figure should be considered very preliminary as it is based on a very small number of cases. The proportion may be an artifact that the earliest exiters from the program were mostly disengaged, having never completed the Career Link component of the program.\(^4\) Whether exiters are less satisfied overall compared to early-stage participants will be better understood over time.

Participant perceptions of the potential benefits and power of the HW program have all improved relative to last year. Compared to feedback from the earliest survey results, the proportion of early-stage participants who agreed or strongly agreed to all four indicators in the chart below has increased. Most dramatically, participant agreement that the HW is what they expected increased about 8 percentage points, up to 57.2 percent; and the expectation that the program can help them get past barriers increased about 5.5 percentage points.

\(^4\) In addition to the participant survey conducted at an early stage of program participation, a survey of recently exited participants is in progress. The reader is warned that the total number of respondents to the exited survey is quite small, and accordingly, should be viewed as strictly preliminary.
Further feedback was elicited in the survey open-ended items, regarding specific benefits that participants have experienced through HW. About 79 percent of those surveyed offered one or more comments on the benefits of the program. The following list shows the broad categories of the comments. The distribution of perceived benefits is similar to the prior year, with the exception that education and training were mentioned more frequently, and support services were mentioned less frequently, to date, compared to information collected through June 2013.

- Career planning; goal setting; planning; job services (e.g., resumes, job search, clothing, interviews): 31 percent
- Education and training: 27 percent
- Case manager; support services; networking: 17 percent
- Goal attainment; empowerment: 14 percent
- Employment and job attachment: 12 percent

In the focus groups, several similar themes of benefits were revealed by comments from program participants. These include:

- Importance of effective case management combined with strong program resources
  - “[I’t’s] not just help for the classes, but looking at other needs in relation to the job or classes—like maybe you need help on school supplies. There are other needs besides the class itself. They look at related issues.”
- Improved self-esteem and confidence; sense of purpose and direction; hope for the future

![Figure 5. Participant Perceptions of the HW Program](image)
“Self esteem, self worth. When I came to this program, I was on a rollercoaster of stuff...I feel like I’m a part of something really amazing in this program with [VCM] taking us along. I see what he’s done not only in my life for me personally, but a lot of the other women in this program, how they feel about themselves compared to when they first started. I think that’s huge.”

“It’s given me hope. I’m going to go back to college this month online… I’m tired of days playing video games … I don’t want to sit on my butt, I want to do something.”

- Identifying strengths; learning job search skills; obtaining credentials, career-oriented work experience

- “[The instructor] taught me not to limit myself...I was going in for manufacturing, and he showed me I have lots of other experience I could use.”

The Program Has Been Implemented with High Fidelity to the Model

Despite some adjustments to process and policy, and changes to the enrollment schedule, the program overall has unfolded with a very high degree of adherence to the model envisioned.

Evidence

Assessments by the evaluation team show that the Regional Alliance and each county team has carried out the program implementation with a high degree of fidelity to the model as planned at the outset of the collaboration. Appendix A provides a detailed scoring of core program components, according to the evaluation team.

There have been a few adaptations to meet program standards and changes in service providers periodically, but there have been no indications that the core features of the program model were altered. As noted, changes were made related to the enrollment schedule, and increased emphasis on a cohort approach did inform recruitment. Some modest adjustments have been made to Career Link by service providers; these are continuous improvements to the same program model.

As foreshadowed in the collaboration chapter, performance monitoring led the leadership to make changes to some program features: occupational coaching and long-term basic skills. Occupational coaching was dropped as a requirement after analysis showed a lack of attendance, apparently due to lack of interest, despite varied attempts
by separate sites to improve the situation. Because of the low attendance, the service tended to be experienced as one-on-one service, rather than the intended small group format. Occupational coaching was not part of the pilot that led to HW, and its value was uncertain; it was seen by some participants and some partners as redundant without offering unique or notable value relative to the effort of attending.

The VCM capacity has recently been increased in two sites; this was feasible due to reallocated resources from occupational coaching, and will allow for an increased target number of enrollments.

The initial grant eligibility criteria were purposefully broad, to allow the program to be widely accessible. As of early 2014, however, individuals who need long-term basic skills will no longer be enrolled, as there would not be enough time to complete both remedial work and the other program components, before the grant ends. Prior to this change, program data showed that participants tended to have relatively high levels of education; about 86 percent had at least a high school diploma or a GED.

Although the changes touch on both service and eligibility, neither of these seriously erode fidelity to the program model. The changes were essentially forced by the realities of the data, and appear to formalize de facto operation of the program, rather than change how participants experience the program.
Services

This section of the report further examines the services offered through the second year of the program and participant satisfaction with those services. Data presented here represent services experienced throughout the program including career mapping, career and resource planning, Career Link, occupational training, and job-placement services.

Detailed administrative data on enrollment numbers and services delivered are presented in Appendix B.

The preliminary findings that are shared in this chapter relate to the following research questions.

- How many individuals participated in and completed Career Link courses, long-term basic skills, occupational-skills training leading to industry certification, internships, on-the-job training?
- How many individuals participated in and completed WorkSource standard/general workshops/services (resume workshop, computer basics, etc.)?
- Which services—case management, training, support services, etc.—were used by each participant and with what intensity?
- Did participants in the health care and manufacturing programs become certified?
- In what ways, if any, did participants benefit from targeted job development and placement services funded through the grant?
- How did participants rate the value and effectiveness of the services they received?
- In what other ways did employers and job seekers benefit from Housing Works (HW)?
- Were supervisors satisfied with work performance of interns and OJT participants?
- How did participant outcomes compare with previous program outcomes for the same individuals?
Career Mapping Is Viewed as Helpful and is Valuable to Participants in Setting Goals

Nearly all of the HW enrollees have received career-mapping services during their participation in the program. This is a core program component, and most HW participants report that career mapping is beneficial to them in identifying and clarifying goals for achieving employment in their desired industry.

Evidence

A total of 98 percent of program participants have completed career-mapping workshops, which is similar to the proportion at the close of the first year. These services continue to be delivered immediately as planned, with the vast majority completing within three weeks of enrollment, which was an implementation goal. A notable exception is one site in which slightly more than two-thirds of participants had completed career mapping in that time frame. Overall, 89 percent of participants received career mapping within the first three weeks of enrollment, a slight increase from the 87 percent that was seen in the previous year.

Figure 6. Participants Receiving Career-Mapping Services
The majority of participants who have received career mapping report that they find it to be a useful resource. In the participant survey, almost nine in ten said that the career-mapping workshop was either very or somewhat helpful. The goals of career mapping include setting and clarifying employment goals that will help them realize their strengths and the steps they need to take. Approximately three in four participants agreed or strongly agreed that the career-mapping workshop clarified their strengths and employment goals. About seven in ten participants agreed or strongly agreed that the career-mapping workshop helped them identify employment goals, and a similar proportion said that career mapping helped them learn skills they were “ready for,” i.e., how closely their skills and interests were aligned with a particular industry.
responses compared to the previous year. The number of respondents that felt career mapping helped them learn skills they were “ready for,” increased 8.7 percentage points. This suggests that the delivery of this service may be better timed to align with participants needs. The number of respondents who felt the workshop helped identify career goals also increased by 7.1 percentage points, suggesting an improvement in effectiveness in the past year.

Of those that did not find career mapping helpful in identifying goals, a number of those had already set their own goals before going into career mapping. This is reflected in responses to the open-ended survey items regarding how career mapping can be improved. Some individuals reported that they had set their own goals, and didn’t need to know about others’ goals. This ties into a larger suggestion that participants gave for improving career mapping. Many responses included requests for more one-on-one time with instructors to provide an experience that is more relevant to them, personally, with a focus on their particular interests and assistance in identifying their strengths and barriers. Additional suggestions for improving career-mapping services included having a greater clarity of instruction and providing more career-specific information.

The Career and Resource Plan is Seen as a Useful Tool for Helping Participants Meet Their Training and Career Goals

Most participants recognize that having a plan that identifies specific steps to achieving goals is valuable.

Evidence

A total of 350 participants have completed a career and resource plan according to I-Trac.5 Nearly all participants in three sites had created a resource plan, while nine in ten had done so in the fourth site. Completion of the resource plan within the first three weeks of enrollment—which is an implementation goal—varied between 47 percent of participants in one site to 94 percent in another site; none met the goal of 100 percent of participants completing within the first three weeks. Overall, 74 percent completed a resource plan within the first three weeks, which was unchanged from the prior year.

5 At an early stage of participation, 85 percent had recalled creating their individual resource plan.
The survey of participants shows that HW enrollees viewed the career and resource plans as positive. More than three in four respondents agreed or strongly agreed that the resource plan helps them identify methods for meeting their goals, and more than eight in ten agreed that the plan lays out the steps they need to accomplish their goals. Nearly nine in ten feel the plan makes sense to them, and expected to update their plan in the future. Eight in ten planned to use the resource plan in order to stay on track with their training goals.
Overall, participants had a slightly more positive view of the career and resource planning than in the first year. There was an increase of more than five percentage points for several questions, including agreeing that: the resource plan shows how they can accomplish their goals; the plan can help keep them on track with their training; the resource plan makes sense to them; and they played an active role in creating their resource plan. Another positive change was a decrease of five percentage points in the number who reported that their case manager made all the decisions about their resource plan. The only negative decrease was that fewer people reported actually using their resource plans, by eight percentage points.
At Exit, Participants Viewed the Career and Resource Plan as Helpful for Attaining Training Goals But Not Employment Goals

Preliminary data on exiting participants suggests mixed results on the value of the individual career and resource planning document.

Evidence

Very preliminary results from a survey of participants at exit showed that only 24 of 36 participants had recalled ever using their resource plan after it was created.\(^6\)

Of those 24:

- Zero agreed that the plan had no real purpose
- 19 had played an active role in updating their plan
- 21 said that the resource plan helped them to stay on track with their training

While most participants valued the plan as a tool to stay on track with training, fewer viewed the plan as a means for achieving employment goals:

- 13 of 24 said that the resource plan helped them reach their employment goals

Other feedback on the HW program, at exit, showed discouragement related to employment goals:

- 18 of 30 said the program helped them get past barriers to employment\(^7\)
- 19 of 30 said the program services were effective in helping them get ready for new employment, or to prepare for better employment

Further data collection is needed to verify whether these preliminary exit results hold true for the larger body of participants. Complete survey data should assess whether these results vary based on engagement in the program, or other personal characteristics such as having dependents. The early-stage survey of participants showed that the most common reason for joining the HW program—reported by about two-thirds of participants—was to get a job. While the team has made great efforts to

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\(^6\) At an early stage of participation, 85 percent had recalled creating their individual resource plan.

\(^7\) Early-stage survey data show that 82 percent had expected the program to help them get past barriers.
focus participants on the interim goal of being *prepared* for employment and gaining experience, it may not be feasible for all the individuals to focus accordingly. Anecdotal evidence suggests that some exiters and current participants are compelled by personal or family matters to take “survival” jobs, to meet immediate needs. In these cases, they may not value the program if it does not quickly yield job opportunities, or if they are thwarted in their longer-term strategy to increase their skills and readiness for high-demand jobs.

**Career Link Helps Participants See Real Career Possibilities**

For a large majority of program participants that had completed Career Link, its greatest value was in providing usable information on real-world careers.

**Evidence**

*A total of 304 individuals (82 percent) had at least started the Career Link service according to I-Trac.*

There was a fairly consistent pattern of individuals’ participation in Career Link across all sites. In two sites, approximately eight in ten HW enrollees at least started these services; in the other two sites, it was approximately nine in ten. About 88 percent of those starting also completed CL; those who did not complete CL are considered disengaged and unable to fully benefit from HW due to missing this foundational component.

![Figure 11. Percentage of Participants Starting Career Link](chart.png)
In the early-stage participant survey, about 17 percent of participants felt the job information provided during Career Link was too vague, and 10 percent felt too much time was spent on resume building. The majority of individuals, however, appreciated the information provided on jobs and how time was spent for activities. In terms of knowledge gained, about 84 percent of participants felt that Career Link was beneficial by helping them understand all of the employment opportunities within industries, and providing them with good information on real-world jobs. When asked what the best part about Career Link was, the three top responses were: information on actual employment options; the guest speakers; and the quality and enthusiasm of the instructor. Participants also reported that the job search preparation activities were beneficial.

![Figure 12. Participants’ Perceptions of Career Link Services by PHA](image)

Compared to the prior year, there were increases in participants’ positive perceptions of Career Link services, most notably an increase of nearly ten percentage points regarding the ability of Career Link to convey an understanding of real career opportunities.

In focus groups, the participants’ perceptions of Career Link services varied by PHA. In two sites, Career Link was viewed very positively; in another, it netted few positive comments, and in the fourth site, participants were ambivalent, citing both strengths and areas for improvement. The highly valued aspects of CL that were mentioned in focus groups included resume building, interview skill building, learning personal strengths, job skill matching, and individualized attention. Clearly, the usefulness of CL services was highly related to the quality and involvement of instructors and VCMs.
Among the features that were deemed problematic were:

- Inconvenience; too little notice of a workshop; too few support services
- Insufficient assessments prior to CL; too little personalization
- Attendees at different learning levels of the class; redundancy of information
- Too little time for assignments

**Placements are Fewer than Expected**

Placements occur late in the sequence of program elements. Not surprisingly, to date, there are fewer than expected placements in internships and on-the-job training (OJT). The low numbers reflect the late start of the program, delays in training, and lack of participant readiness.

**Evidence**

The program implementation plan calls for a total of 210 placements by the close of the grant. As of June 30, 2014, only 31 individuals had completed internships or OJT's. In interviews, partners suggested that the low placement numbers can be attributed to the late start of the program as a whole; to low work readiness of participants, particularly their soft skills; and to delays in obtaining and completing training. There was no clear indication that any one of these factors was the most important.

As the participants represent a very barriered population, they often have difficulty with job interviews, and some struggle to retain employment due to low soft skills. Partners reported that case managers have to work very hard to get participants through the Work Ready Elements (WRE) training that leads to a Talent Link certificate, as WRE is not designed for job seekers with multiple barriers. One partner explained, "The hard part is [that] the clientele we work with are barriered individuals ... using a system intended for high level Oregonians." Failure to complete this certificate causes delays in a participant’s progress.

As noted previously, in Multnomah and Washington Counties, employer connections are predominantly made via Connect to Careers (CtC), a regional clearinghouse for placements. This is an integrated approach, using a common infrastructure to reach

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8 Talent Link is part of the Oregon Governor's Initiative to Create Work Ready Communities.
employers. Other sites also rely on existing workforce infrastructure to reach employers, yet in all sites there still exist efforts to connect to employers individually.

Discussions with liaisons and case managers indicate that placement processes are in place and functioning correctly. Liaisons and case managers report that they are working closely with job developers to connect participants with industry representatives, internship opportunities, and jobs. In one site, the job developer, in consultation with the VCMs, had cut the time-to-placement from several months down to 80 days. This change netted a few new hires in spring 2014.

**Employers Find That Housing Works Participants Are Prepared for Employment in OJT and Internships**

Very preliminary data from employers that have hired HW participants in internships and OJT revealed that most have positive feedback on the individual’s performance. The vast majority of employers positively view the ability of WS to provide candidates.

**Evidence**

*A total of 31 individuals have completed internships or on-the-job training programs. The majority of employers surveyed agreed that the program is beneficial to their hiring needs.*

While there are few HW participants who have completed internships or OJT to date, and a very small number of employers who have responded to the survey regarding these hires, preliminary data suggest that the program is viewed positively by most. Two employers reported having a bad experience with their hire, however 11 of 12 strongly agreed or agreed that the participant met expected performance standards. Employers reported the following results that generally showed favorable regard for their hires or that they view the HW program as valuable for their company:

Context of hire:

- Six of 12 employers felt that it was difficult to find someone for the position
- Eleven of 12 employers agreed that the job requires some on-the-job training
Six of 12 employers agreed that the incentive provided by HW was the reason they participated

Performance:
- Eight of 12 reported that feedback from colleagues who work directly with the participant has been positive

Outcomes:
- Eight of 12 employers agreed that WorkSource can provide strong candidates; none disagreed
- Ten of 12 said they will consider hiring, and recommend others in their organization hire, HW participants in the future
- Nine of 12 agreed the program was a worthwhile investment for their company (none disagreed)
- Ten of 12 agreed they would consider participating in this program again and encourage other businesses to participate; none disagreed

Overall, employers seemed very satisfied with the quality of employees coming from the HW program. No employers strongly disagreed with any statements about the positive benefits of their experience with HW hires. A number of employers stated that they felt this program was a good way to “test out” employees before hiring into a permanent position.
Liaisons and Case Managers

This chapter provides updated observations on the roles and functions of the WorkSource liaisons and the vocational case managers (VCMs); the latter are sometimes referred to as employment specialists. This section draws on information from the 2014 staff interviews, participant focus groups, and participant survey, as well as a review of recent I-Trac data.

This chapter seeks to address two research questions regarding the roles and effectiveness of the liaisons and VCMs. The first question refers to program implementation, and the second to program impact.

- Did case managers counsel and refer participants into workforce and social services in a manner consistent with the model?
- How did participants rate the value and effectiveness of the services they received?

Liaisons Continue to Provide Services in Keeping with the Model

WorkSource liaisons continued to be an important source of support and workforce development expertise for the VCMs. This support has remained consistent despite turnover in most liaison positions since the last interim report.

Evidence

The site visit data indicate that all four of the liaisons continue to work very closely with the VCMs, providing troubleshooting and other types of support on a near-daily basis to help improve participant outcomes. This role has remained consistent over the past year despite turnover in three of the four liaison positions. Types of support include helping the VCMs determine the most appropriate occupational training for the participants, helping clarify WorkSource policies, securing WorkSource training on interviewing and resume development, coordinating work readiness assessments and work experiences, and more. In addition, the VCMs interact with liaisons from other WorkSource locations via the implementation team meetings. Although the VCM takes the lead in working with the participants, the liaisons occasionally participate in the
VCMs’ meetings with participants, and they often attend the initial Career Link sessions and career-mapping workshops to better understand participant needs. In addition, the liaisons have continued to provide training to new VCMs, and the latter gave very high praise regarding the quality of the training.

Despite turnover in liaison positions, there is little evidence that this has led to serious problems in VCM interactions with WorkSource; where turnover has occurred, the VCMs have indicated that the liaisons adapted very quickly to their positions and were of great value in connecting participants to WorkSource services. When asked what could be done to improve the liaison function, a Home Forward VCM said, “I think [our liaison is] a great support, and it’s a great partnership.”

For Most Participants, Case Management Was Very Effective

Across the initiative, a strong majority of participants considered their case management very effective at the start of the program. This majority shrank upon exit from the program, but the small exit survey sample size completing the survey render conclusions premature at this time. Nevertheless, responses from some focus group participants suggest that VCM turnover may play a role in decreasing satisfaction.

Evidence

The survey data indicate that the majority of participants were very pleased with the case managers at the early stages of the program. As shown in Figure 13, about four out of five respondents felt their VCM provided gentle guidance, was helpful and easy to reach, and understood their needs as they began the program. Likewise, very few participants indicated that their VCM did not listen well or explain things in an understandable way.
Although the exit surveys found that the majority of participants continued to be pleased with their VCMs, there was a decline across the board in positive perceptions of VCM effectiveness on exit from the program. Figure 14 shows findings from all exit survey questions on VCM effectiveness, and Figure 15 makes a direct comparison of findings from similar questions in the early-stage survey and the exit survey.
As noted in the next finding, “Quality Case Management May Be a Key Factor in Program Success,” the focus group participants suggested that inconsistent case management (e.g., resulting from turnover) could play an important role in disengagement from the program. This may account for the decline in perceived VCM effectiveness upon exit from the program as shown above in Figure 14 and on the next page in Figure 15. However, it is premature to draw conclusions from the exit survey findings at this stage of the evaluation. The sample size (n=36) was very small. Furthermore, survey completers who were early exits (had not completed Career Link) may not have had sufficient experience with Housing Works to make a useful assessment.
Quality Case Management May Be a Key Factor in Program Success

The participant focus groups suggested that the quality of case management is of critical importance in completing the program successfully. Where effective case management is present, participants appear to be more engaged and active in the program.

Evidence

Focus group participants who were pleased with their VCM tended also to be very positive about the program as a whole, and those who were displeased with their VCM tended to be more pessimistic about the program. The focus group participants represent a small subset of the full participant group; as such, their views are not representative of the views of all participants. However, the focus group findings may shed light on the nuanced issues that all participants face.
Based on comments at the focus groups, effective VCMs have the following characteristics:

- Consistency of service
- Small case loads
- Strong compassion for low-income participants with multiple barriers
- Ability to listen and understand participant strengths, as well as the pace of progress that is right for each
- Persistent and proactive attention to prevent dropouts
- Resourcefulness; ability to work with participants, WorkSource liaisons, and other agencies to overcome barriers

Where case management was perceived to be very effective, focus group participants gave high praise to the program and their prospects for success. This was most evident in one particular county in which the participants offered universal praise for their VCM. In another county, most participants had high praise for their current VCMs, but several noted that their participation had declined or lapsed completely following the departure of their original VCM. Focus group participants at a third county were universally displeased with their case management, which continued to suffer from significant delays and turnover as well as other problems (e.g., being reactive rather than proactive about contacting the participant), and they felt this lack of support was a key factor in their pessimism about—and lack of success with—the program as a whole. A participant in the fourth county focus group summed up this point:

“… a lot of what you can and can’t do in the program depends on your advocate. So if you have an advocate that … is willing to work with you and share with you what you can and cannot do in the program, [then] you get things taken care of, you feel more positive, proactive, you get more accomplished. Otherwise you just kind of fall apart … things you had access to with one [case] worker, you don’t have access to with [another].”
Case Managers Did Not Meet Vocational Contact Goals, But Participants Were Satisfied with Frequency of Contact

VCMs continued to tailor the frequency of vocational contacts to participant needs. In many cases, the number of contact visits fell short of the number projected in the model. However, most participants were satisfied with the amount of contact they received.

Evidence

The program model anticipated that participants should receive at least 10 vocational contacts per quarter. Figure 16 shows that VCMs made an average of 8.6 selected vocational services contacts\(^9\) per quarter.\(^{10}\) This figure reflects a slight decline from the 8.9 contacts documented in the previous interim report.

![Figure 16. Select Vocational Services: Average Number of Contacts Per Quarter](chart.png)

\(^9\) In this chart, “select vocational services” is defined as contacts that are considered vocational in nature, including career mapping, vocational case management, support service case management, and resource planning. The rationale for including support services case management is that it is integral to the model and would be difficult to separate from vocational contact. The contacts reflected in this chart do not include long-term basic skills, internship, job development, occupational skills training, OJT, Career Link, occupational coaching, other basic skills, and short-term vocational training.

\(^{10}\) From enrollment to June 30, 2014 or to exit.
Findings from the participant focus groups and VCM interviews indicate that VCMs continued to tailor their contacts to participant needs and desires rather than adhering to a prescribed number of contacts. For example, several VCMs made their mobile phone numbers available to participants to enable after-hours contacts, and others proactively followed up with participants to ensure that they were on track to complete their training. Numbers of contacts cited in the focus groups ranged broadly, from more than once a day to once a month.

When asked how often they typically spoke with their VCMs, nearly two out of three (62%) survey respondents indicated that they talked with their VCM once or twice a week. When asked how they felt about this frequency of contact, more than four out of five (85%) felt it was about right. About one in ten respondents (9%) felt they were not being contacted often enough by their VCMs.

Detailed participant survey results can be found in Appendix C and Appendix D.

Figure 17. Frequency of Case Manager Contact According to Participant

11 That is, approximately within the expected parameter of 10 per quarter.
Lessons

Partnership and Collaboration

The collaboration has good representation of all the key stakeholder groups, and is high functioning. The collaboration has remarkably uniform commitment and investment from all parties. The time spent learning about each other’s systems has yielded valuable, deep understanding of the other systems’ priorities, constraints, and capabilities.

- The support offered by the grant management and communication structures should be continued, to aid the partners in ongoing implementation and coordination of the program.

The partners have discovered that leveraging resources, such as child care and transportation, is critical for participant success. Partners have leveraged both in-house resources and external resources to good effect to meet their goals. While the work of reducing redundancy can be labor-intensive, efforts to this end are essential to the alignment of systems.

- The partners should, as planned, continue to identify opportunities to reduce silos, and find integrated approaches to service delivery. This is a requisite step to co-investing funding streams.

- Successes and challenges in alignment endeavors are likely to be closely watched by outside parties for lessons to apply to other systems alignment.

There is very strong interest in sustaining the collaboration, and partners have begun to craft plans for partnerships outside the grant, which will continue work across the housing and workforce systems. Nonetheless, partners question the feasibility of continuing to carry out the HW model without significant additional grant resources.

- An immediate challenge is to envision the multiple potential paths for the partners to continue to carry out the model. This includes a non-grant scenario, and the feasibility for each partner to invest routine or formula funds.

- It is urgent that the collective continue to focus diligently on the issues of sustainability.
Program Implementation

The pace of enrollment has been slower than originally planned. Recent contributing factors include high turnover in VCM positions. In addition, the targets for enrollment have de facto increased in that the partners now aim to reach the targeted number of active participants, above and beyond the number of those technically enrolled, which can include disengaged individuals.

- A no-cost extension of the grant would be helpful; it would allow more time to reach enrollment targets and help ensure that more recent enrollees have time for training, placement, and/or follow-up.
- A longer enrollment period, however, can negatively affect the outcome analysis, due to a smaller window of time to observe (some) participants’ follow-up, and a smaller number of cases for such research questions.
- Regardless of an extension, partners should enroll all the remaining cohorts as promptly as feasible, to minimize these limitations.

One of the PHAs moved in earnest to recruiting and training via a cohort approach, and the three others are beginning to apply a cohort approach to their training of existing participants. Under the cohort approach, a wave of participants is recruited for training on a particular sector or career path, or a specific type of job, or even for two industries (office work and health care) if there is notable cross-over in work environment and soft skill elements. Although this change is currently in its early stages, interview findings suggest that it has helped improve participant perceptions of the clarity of communication at orientation, compared to feedback from the prior year.

- This cohort approach appears to have been more effective than the prior more open waves of enrollment. Continuing this approach may result in greater ease in the logistics of training, and improved communication and engagement of participants.

Participants provided positive feedback about their early-stage experiences in the HW program. Compared to the prior year, satisfaction has increased on many indicators, and more participants report that HW is what they expected, and envision that the program can help them get past barriers. Satisfaction with enrollment overall is high, and the proportion who said it was clearly explained increased over the prior year. Some sites managed to streamline the enrollment process, but further efforts would require high-level policy changes, as noted in the Regional Alliance white paper.

- The burdens related to documentation of eligibility remain higher than necessary. Further changes will require greater alignment of systems, which may be beyond the purview of the HW program.
Services

Through the second year of the program, participants reported a high level of satisfaction with the Housing Works program as a whole. Through surveys of their experience and focus groups, participants report that, overall, the career-mapping, career and resource planning, and Career Link services they received were extremely useful in helping them learn more about careers in their industry of interest, identify and set goals, and learn the steps needed to stay on track with their progress.

Early-stage program components such as career mapping and Career Link have been subject to constant adjustments to improve the relevance, clarity, and quality of the material; to be clear, these are highly regarded and valued overall.

- Career-mapping and Career Link components should be further scrutinized to identify—and, where feasible and reasonable, to eliminate—redundancy with other services provided to participants. For participants who have had pre-grant job preparation workshops that make program requirements appear redundant, the team should assess opportunities to make the experience more palatable.

The partners have made remarkable improvement in clarifying the central role of training and education in the program, and explaining the expectations of participants. Nonetheless, it is difficult on the whole for participants to fully envision what lies ahead.

- The cohort approach should be continued, to make it easier to explain the scope of training that is available.
- Additional communication tools are needed to convey the importance of proactively dealing with a criminal history, and helping participants understand how this could affect their choices in jobs to pursue.

The frontline staff and participants alike have repeatedly stressed the importance of individualized assessment to tailor participant plans, resources, and ongoing support.

- Maintaining a ratio of 1:30 will be critical in permitting the desired level of individual support.
- Nonetheless, it would be worthwhile to examine opportunities to balance the efficiency of cohort enrollment and training with the labor-intensive tailoring of participant plans.
Liaisons and Case Managers

The WorkSource liaison role is an important, highly valued, and successful component of program implementation. In spite of significant turnover, liaison services have continued to be effective and well regarded. In addition to connecting VCMs to WorkSource services, the liaisons have played an important role in providing training to new VCMs. Efforts to recruit and train appropriate WorkSource liaisons in the event of turnover have thus far been effective.

- It is vital to hire liaison staff who are already exceedingly skilled and knowledgeable about workforce services; their orientation to the HW model of coordination then becomes the key training needed for the position.

A solid relationship between the liaisons and VCMs is indispensable for effective mutual support of the program participants.

- The frontline teams should be encouraged to continue forward with the patterns and modes of communication and relationship building enjoyed to date.

A strong majority of participants considered case management highly effective at the start of the program. Very preliminary early exit survey results suggest there may be a decline in this percentage at the time of exit. Focus group responses indicate that VCM turnover is linked with dissatisfaction, and that effective case management is linked to active engagement.

- Future exit survey results will be key for assessing changes in participant opinions of VCM effectiveness. In the meantime, program managers should work diligently to ensure that gaps in case management are filled quickly.

- Future efforts should probe more deeply into the causes of VCM turnover as well as the relative importance of VCM vis-à-vis other key program components.

VCMs continued to tailor the frequency of vocational contacts to participant needs. In many cases, the number of contact visits fell short of the implementation goal. However, most participants were satisfied with the amount of contact they received.

- While the target figure of 10 vocational contacts per quarter appears useful as a general guideline, VCM contacts should continue to be adjusted as needed to ensure that participants are guided through the program effectively. The number of contacts should continue to be flexibility adjusted to the needs of the participant, and his or her stage of participation.