

Off Welfare and Into Work

*A Report Series of the
Postemployment Services
Demonstration*

Keeping Welfare Recipients Employed

*A Guide for States Designing
Job Retention Services*

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A CONCISE LOOK AT THE NEED TO PROMOTE JOB RETENTION

Now more than ever, the path to self-sufficiency for most welfare recipients involves finding and keeping a job. The recently enacted welfare law, the Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) of 1996, emphasizes the need for individuals to take personal responsibility in their move toward self-sufficiency. The law underscores the importance of work and requires most able-bodied individuals to find some type of work within two years after they start collecting welfare.

For welfare recipients, the time limits that the new law imposes significantly raise the stakes of not being employed. As the new law is implemented, more individuals who are less job ready will be entering the labor market. Many of these individuals, unused to the world of work, will be in danger of losing their jobs. While time limits may motivate some to hold onto their jobs, many are likely to face situations that make it hard for them to do so. Although welfare recipients must try to deal with these challenges, external assistance and support can help them overcome some of these barriers. States and other local agencies may be able to provide support that makes individuals' transition from welfare to work smoother and more successful.

Underpinnings of the Job Retention Problem

While many welfare recipients who find jobs are able to keep them, a significant minority have a hard time holding onto jobs and lose them fairly quickly. For instance, among more than 1,200 welfare recipients in four cities who found jobs between 1994 and 1995, only 3 out of 5 were employed continuously in some job during the one-year period following job start (with two-thirds of them being employed in the same job for the whole year). In all, nearly 40 percent experienced job turnover within the year; among these, two-thirds moved to a job with higher wages, but nearly one-third experienced no change or a reduction in earnings as they switched jobs. Despite the sound economy during this period, more than 30 percent of those who found a job were not working in any job at the end of a year.

Many welfare recipients' reasons for losing a job are complicated. Most find low-paying jobs but still have to deal with the standard costs associated with work (such as finding affordable child care and transportation). Many must cope with a reduction in other forms of social support (such as housing subsidies and, perhaps, food stamp and medical benefits). Nearly one in three work nonstandard hours (evening, night, or swing shifts), making child care and transportation arrangements more complex. Because they have little prior work experience, many welfare recipients have unrealistic work expectations and walk out of their jobs when these expectations are not met. Many have little in the way of personal or social support and find the transition from welfare to work overwhelming and stressful.

In this new environment, the stakes are also higher for states, which face financial consequences and penalties unless a certain fraction of the welfare caseload is employed or actively participating in work activities. Furthermore, it is in states' fiscal interest to ensure that most welfare recipients can find sustained employment and move toward self-sufficiency.

In attempting to move the welfare caseload into employment, states are likely to face many challenges. For instance, as larger numbers of low-skilled individuals enter the labor market, many of them are likely to work part-time and to continue to receive public assistance. Furthermore, some will lose their jobs and cycle in and out of welfare. Each of these factors will make the benefit determination process, as well as eligibility workers' roles and responsibilities, more complex. Eligibility workers will have to act quickly to ensure that benefit determinations are correct and that errors in benefits during the early months of employment do not create obstacles to job retention. Programs also must ensure that other types of employment support (such as child care subsidies and health benefits) are readily available to employed welfare recipients who need them.

States now have wide latitude to use block grants to formulate programs to promote sustained employment. The strong economy and falling caseloads have created an excellent opportunity for states to experiment with new ideas and options to examine alternative approaches or strategies to promote job retention and long-term self-sufficiency. Change is possible at various levels, including broad policy changes at the state level, more focused changes at the local level, or both. In making such changes, states should consider what services are currently available to TANF recipients and add additional services where there might be the greatest need. Finally, job retention services need not wait until welfare recipients have found jobs; they can be incorporated into early aspects of job placement, such as job clubs or job training workshops.

Questions Addressed in This Report

- What makes job retention hard for welfare recipients, and what can be done (broadly at the state or local level, or by job retention programs) to promote job retention?
- What key factors must state and local agencies consider as they set up job retention programs?

The answers to these questions evolve primarily from our study of the Postemployment Services Demonstration (PESD), a federally funded, large-scale demonstration that tested ways to promote job retention for welfare recipients. The PESD programs operated in four sites between 1994 and 1996 and took an individualized case management approach to promoting job retention. Extensive data were collected as part of the PESD evaluation. These include 15 focus groups across the four sites (each conducted with 8 to 12 sample members), multiple rounds of interviews with program staff during various phases of program implementation, reviews of about 50 client case files with

Key Recommendations for Providing Job Retention Services

- **States can make policy changes to ease the welfare-to-work transition for many individuals.** Some challenges that individuals face during the transition are exacerbated by the current system's deficiencies in meeting their needs. States and local agencies can make broad changes, such as having more generous state tax credits for low-income individuals, simplifying access to transitional benefits, and making adequate child care, transportation, and housing assistance available. More generous earnings disregards policies will help working TANF recipients in the short run, but will lead them to be more likely to use up more of their time-limited benefits.
- **States can train income maintenance staff and case managers to detect welfare recipients' emerging needs and guide them toward appropriate assistance to overcome barriers to sustained employment.** Case managers should also be trained to detect problems such as severe mental health, substance abuse, and domestic violence issues and channel individuals early into appropriate services. Staff also should receive training in job search assistance and reemployment services so they can quickly direct those who have lost jobs toward such services.
- **Options for the design of job retention programs and services are many; choices depend on the program goals, resources available, and target population.** While setting up job retention programs, agencies must consider interrelated questions: *Who to serve? What types of services to provide? How to deliver services? How much to promote services? When to provide services? Who will run the programs?* For each of these questions, agencies have a menu of choices to consider. Because these issues are interrelated, the answer to any one question will have implications for other choices. In designing such programs, states and local agencies should consider carefully what job retention services are currently available, and consider what additional types of services to include that might provide the greatest additional benefits.
- **Job retention programs should recognize that employed welfare recipients have diverse needs and tailor services to meet them.** One size does not fit all for welfare recipients who find jobs. Job retention programs could provide intensive case management services to a targeted few (such as those who have low education levels or enter low-paying jobs) and make less-intensive supports available to others depending on their need.
- **Many job retention services can be integrated into job preparation activities before job start.** For instance, agencies can conduct workshops on dealing with coworkers and supervisors, finding child care and transportation and making back-up arrangements, and understanding how to budget income and expenses while clients are in job clubs or job training workshops.
- **Agencies should evaluate their job retention programs to test different approaches.** States are just starting to set up job retention programs, and little is known about the effectiveness of different job retention approaches. Evaluating different types of programs can provide information on program implementation and on how to most effectively use scarce resources.

case managers, program tracking data, and interviews with more than 1,200 sample members. Our study of the PESD programs has helped clarify important aspects of the job retention problem for other programs attempting to provide services to the newly employed. Additionally, we include information from other efforts or approaches being taken by various state and local agencies to assist clients in their transition from welfare to work.

Two important factors must be considered as we address the key questions in the report:

- **The PESD programs were implemented just before passage of the new welfare law; there have been major changes since then.** The PESD programs were established in the context of the AFDC and Job Opportunities and Basic Skills Training (JOBS) programs. Current program setup and challenges for welfare recipients may be somewhat different from what we observed under the old welfare regime. Nevertheless, many of our observations are valid and timely in the current welfare environment.
- **The PESD studied pioneer programs that attempted to address the issue of job retention for welfare recipients; however, not all elements of these programs worked as hoped. Drawing on our observations of program features and implementation, we attempt to guide readers of this report into thinking more broadly about variants of the PESD model or other program models.** The PESD programs followed federal guidelines to track a target population and follow a general model, based on extended case management services, for promoting job retention. Preliminary findings show that these programs had, at best, small effects on sustained employment, a result partly of the program model and partly of alternative services already available in the local areas. Programs offering different types of services and in other service environments will have to be implemented and studied before we can answer questions such as: Which types of services can be implemented easily? Which are more difficult to implement? What features make programs effective? Which groups are most likely to benefit from different services?

This Report In Brief

Chapter I: Briefly describes the main features of the PESD programs.

Chapter II: Discusses the challenges that newly employed welfare recipients experience and recommends services that job retention programs and broader state- or local-level programs can provide. Program operators reviewing this report should view these recommendations as a menu from which they can choose the set of services most appropriate to their local needs.

Chapter III: Provides a framework for setting up job retention programs, and is a starting point for agencies considering setting up job retention programs. It provides a list of key questions to think about, as well as possible solutions and implications.

I. PESD--A CASE MANAGEMENT APPROACH TO JOB RETENTION

PESD was initiated by the Administration for Children and Families (ACF) of the U.S. Department of Health and Human Services (DHHS) in 1993. Its purpose was to gain systematic information on employment paths out of welfare and test ways of promoting job retention among welfare recipients. The PESD approach to job retention was based on the following guidelines for service delivery:

- Extended case management for employed welfare recipients who were JOBS participants
- Flexible service delivery approach, with a focus on job retention and reemployment
- Support service payments to deal with one-time, employment-related emergencies

The PESD programs were implemented in four sites. The PESD programs were implemented in (1) Chicago, Illinois; (2) Portland, Oregon; (3) Riverside, California; and (4) San Antonio, Texas. During the period of program operations, the states were fairly diverse in terms of the generosity of the state welfare benefits, the work incentives provided for welfare recipients, and the resources available for newly employed welfare recipients. For instance, in 1995, California had the sixth most generous welfare program in the country (maximum benefits of \$607 for a family of three). In comparison, the maximum grant in Texas of \$184 for a family of three was half the national median. Two sites provided added incentives for all welfare recipients to work by having more generous or extended earnings disregards policies, while the other two sites had standard disregards policies.

The programs targeted newly employed welfare recipients who were JOBS participants. In the four demonstration sites, JOBS and other welfare program staff identified welfare recipients who had participated in the states' JOBS program and found employment during a 12- to 18-month period between March 1994 and December 1995; about 500 clients in each site were assigned at random into the programs, and another 500 were assigned to a control group. The programs focused on clients who were nonexempt and served both clients who worked full-time and those who worked part-time (although a couple of sites focused on clients who worked at least 10 or 15 hours a week). Two programs focused on clients who had participated in some job placement component of the state JOBS program and were somewhat more job ready. The programs enrolled and attempted to serve all identified clients, whether or not they continued to receive welfare after finding a job. Final impact findings about the effectiveness of these programs will be available by late summer 1998.

The PESD programs were extensions of JOBS programs but were run by separate units. The programs operated between 1994 and 1996, and each site hired between three and five *case managers* to serve individuals assigned to the demonstration programs. Although set up by the state

welfare agency as an extension of the JOBS program, the programs were run by staff apart from the main JOBS program. This was done to distance the programs from the welfare bureaucracy and to promote greater service flexibility than was possible under the JOBS program.

Case management was the cornerstone of the PESD programs. All clients identified for program enrollment were assigned to a PESD case manager. These case managers tried to maintain regular contact with all clients, identify emerging problems, and provide services to alleviate problems. Program guidelines specified a broad role for the case managers that included counseling, ensuring access to transitional benefits and other support services, providing referrals, and intervening as necessary with landlords, employers, or other parties. Case managers were also given wide latitude to make support service payments to deal with temporary emergencies that might affect employment.

Case managers took a flexible and less bureaucratic approach to service delivery. The case managers were informal in their approach to providing services and tried to minimize an officious approach. They provided individualized services to clients and stressed personal and informal communications. Case managers attempted to maintain regular contact with clients, sent them cards and newsletters, and were willing to meet at times and locations convenient to the clients. They sometimes worked in the evenings or on weekends so they could more easily reach clients who worked during the day. They remained accessible to clients by carrying beepers or cell phones or by using telephone answering machines.

Case managers delivered a wide range of services to clients. Through extensive contact with clients, case managers identified needs and provided services to address them. Data from the client service tracking system show that these services included counseling and support, job search assistance, resolution of benefit issues, service referrals, and support services payments (Figure 1).

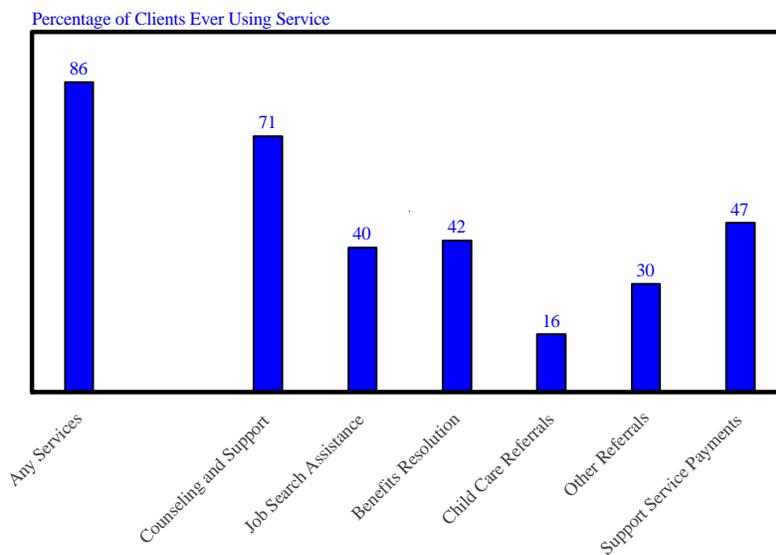
Counseling and Support. The most common service was individual counseling and support; more than 70 percent of clients received some level of it (Figure 1). Case managers counseled clients on such issues as managing and budgeting money, planning for contingencies such as breakdowns in child care/transportation, learning workplace behavior, and dealing with nonsupportive families and friends. Staff members also encouraged clients, provided moral support, and listened while they discussed frustrations and problems.

Job Search Assistance. Case managers and other staff members provided assistance to clients who had lost jobs or wanted better ones. The job search services ranged from individualized job search assistance provided by case managers (including specific job leads and general guidance on job search methods) to more structured job search workshops available through the JOBS program. About 40 percent of all clients enrolled in the programs received some job search assistance within six months after enrollment.

Resolution of Benefit Issues. Case managers helped clients apply for and resolve eligibility or benefit issues for transitional Medicaid and child care, welfare, and food stamps. More than 40 percent of clients received some assistance with benefit issues within six months after program enrollment. Case managers also helped clients access child care funding subsidies and told them how to obtain the Earned Income Tax Credit (EITC).

Figure 1

Service Use Among PESD Clients During the First Six Months After PESD Enrollment



Service Referrals. Case managers helped clients find needed services, including referrals to health care or child care providers, to skills training or education programs, and to legal aid or specialized individual or family counseling. About 16 percent of clients received child care referrals; about 30 percent received referrals to other agencies or individuals.

Support Service Payments for Work-Related Expenses. Case managers authorized payments to cover temporary expenses associated with job search, employment, and emergencies that affected employment. This assistance was expected to prevent small emergencies or crises (such as having a car break down or having no money for suitable work clothes) from leading to job loss. Nearly half the clients received some support service payment (other than transitional child care or Medicaid) during the first six months after enrollment.

Welfare recipients who are single parents, like other low-income parents who raise their children without a partner, face many challenges to finding and keeping jobs. Focus groups with welfare recipients who have found jobs, discussions with case managers, and surveys conducted with more than 1,200 sample members reveal the breadth of issues that can affect welfare recipients' ability to remain employed. These issues include problems outside of work and in the workplace. Sometimes these problems were present as soon as clients began to work; in other instances, they emerged gradually as the stresses of balancing work and family life increased.

Many individuals face problems *outside of work*. About 70 percent of sample members that we surveyed reported such problems. Problems related to child care, finances/budgeting, family, and transportation were the most commonly reported categories outside of work that made it difficult for welfare recipients who found jobs to hold onto them (Figure 2).

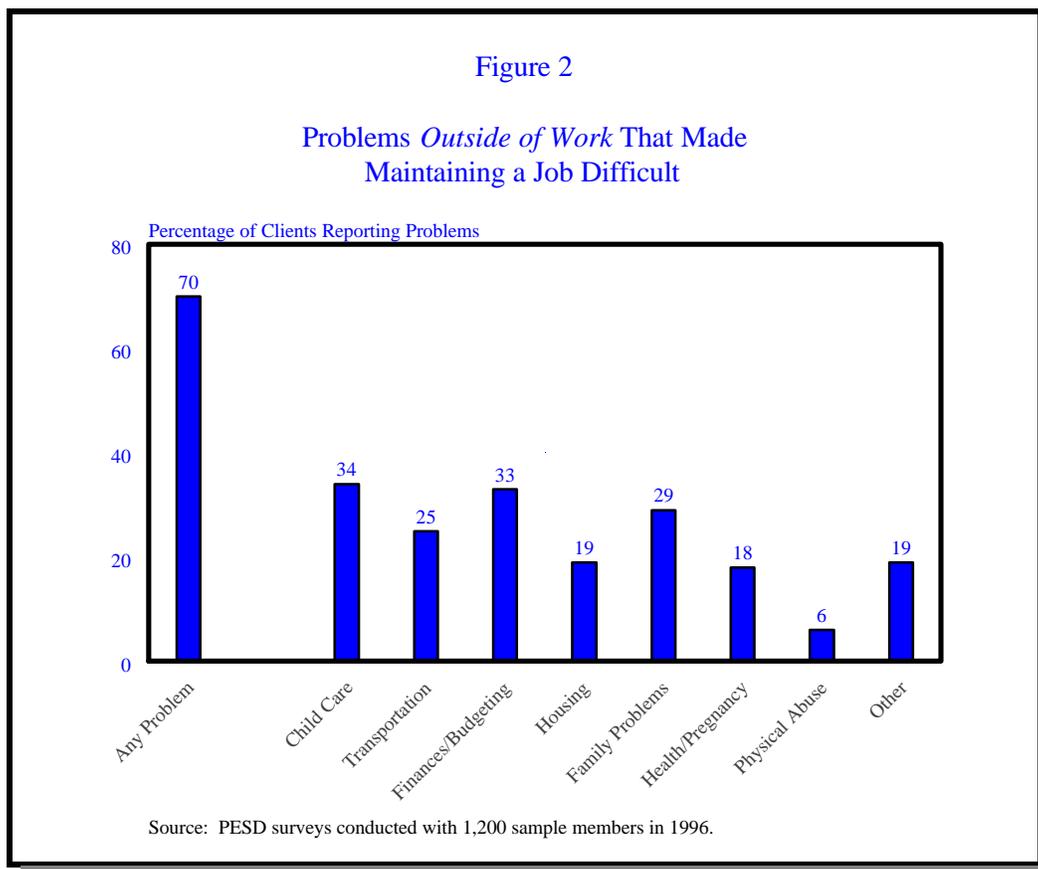
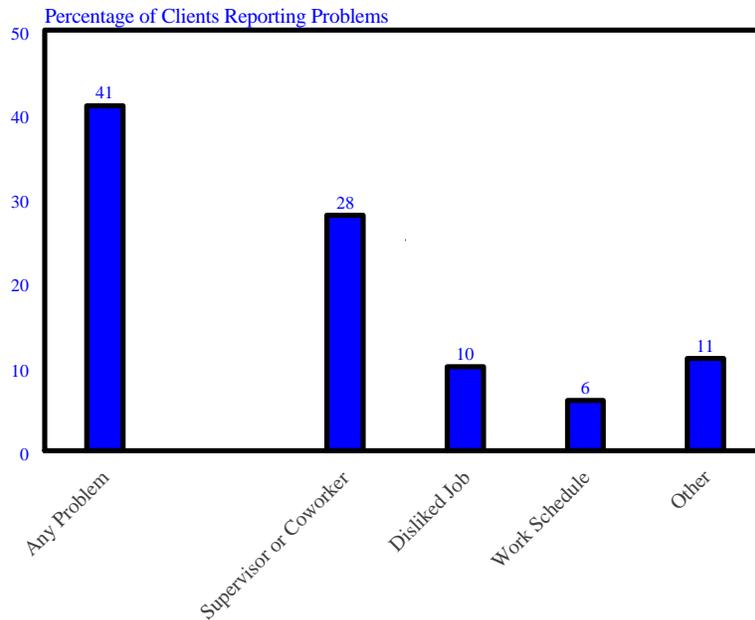


Figure 3

Problems at Work That Made Maintaining a Job Difficult



Source: PESD surveys conducted with 1,200 sample members in 1996.

In addition, some welfare recipients face problems *at work* that make it difficult to maintain their jobs. More than 40 percent of sample members experienced a problem at work. About 68 percent of them (28 percent of all sample members) said getting along with their coworkers or supervisor was difficult (Figure 3).

A broad set of factors make the welfare-to-work transition difficult for welfare recipients:

- Few financial rewards, given the high costs of working
- Child care barriers
- Transportation barriers
- Housing barriers
- Budgeting challenges
- Unfamiliarity with the world of work

- Physical health, mental health, and substance abuse problems
- Lack of personal support
- Difficulty finding another job

Some of these challenges are fully or partly related to individual situations and circumstances. Others are intensified by structural or systemic obstacles to a smooth transition from welfare to work. Next, we discuss each type of problem, focusing on how they can affect welfare recipients. We then suggest different services that can alleviate some of these barriers. We highlight services that job retention programs can provide, as well as broader steps that state and local agencies can take to promote job retention and successful welfare-to-work transitions. In providing recommendations for state and local agencies, we also refer to some programs currently being implemented in some states.¹

Notes to Program Operators

First, not all clients will have to deal with all the problems we describe, and clients are likely to vary greatly in their particular obstacles to job retention. We describe a range of barriers to highlight the diverse nature of problems that can affect job retention and to bring attention to the services that can help mitigate these barriers. Different areas or local agencies may have different types of problems, and states and local agencies will best be able to identify the problems most prevalent among their clients.

Second, although many people use the terms “postemployment” and “job retention” synonymously, job retention services need not start after employment. Many job retention services, such as counseling, managing and budgeting money, planning for child care and transportation contingencies, learning workplace behavior, and dealing with nonsupportive families and friends, can be integrated into job clubs and life skills training workshops during the time of job search and placement.

¹We indicate these examples with an asterisk and at the end of this report include a table that provides a brief description of the program and, where available, the phone number of a contact person (Table A). More detailed information on most of these programs is available in Johnson and Meckstroth (forthcoming summer 1998). These examples do not represent a comprehensive list of all programs being implemented by state/local agencies, nor do they necessarily represent only model programs that have been evaluated and proved successful.

A. CHALLENGE: LOW WAGES, BUT HIGH COSTS TO WORK

It is well known that many welfare recipients find entry-level jobs that pay low wages, but what is not so widely recognized is the high costs for these individuals to work. The jobs that PESD sample members held most frequently were in service, sales, and administrative support. These jobs paid about \$6 per hour, on average, and nearly one-third paid less than \$5 per hour. These jobs typically offer few fringe benefits; for instance, fewer than half the sample members had employer-provided health insurance, and less than 40 percent had paid sick or vacation leave. Furthermore, the costs of working are high relative to the rewards. Three direct and immediate costs emerge as welfare recipients start working: (1) child care, (2) transportation, and (3) other expenses associated with employment.

Many welfare recipients need child care in order to work. Costs of formal care (center-based care and regulated family child care), unless subsidized, can be high compared with the potential earnings of welfare recipients. For instance, a single mother who earns minimum wage and has one child would have to spend 38 percent of her income to purchase formal care unless she received a subsidy (Kisker and Ross 1997). As discussed in the next section, subsidies are available to many welfare recipients, but bureaucratic snags can sometimes get in the way of simple access to these funds. Although less costly options (such as relatives and friends) are available to some, these arrangements sometimes prove less reliable.

Transportation costs can also absorb some of the new income from earnings. In large cities with good public transit systems, individuals can ride modestly priced buses or trains, but even these expenses can add up for individuals who not only have to get to and from work but also have to take their children to and from child care. Those who use a car to get to and from work often experience breakdowns and large repair bills.

“We spend more money now to get back and forth to work with transportation. . . . That was more money than I had to spend.”

-- PESD Focus Group Participant

To start working, individuals also often need new clothing or uniforms, shoes, and sometimes tools. Some may need to purchase health insurance if Medicaid or some other form of public health insurance does not fully cover them and their children.

Benefit reductions can offset some of the financial advantages of work and undermine the ability of those who find jobs to make ends meet. Despite the low-paying jobs, many welfare recipients experience reductions in welfare, food stamps, medical assistance, and housing subsidies. State rules on the benefits that welfare recipients can retain after they start working differ. Among the PESD states, California and Illinois have generous maximum benefits and earnings disregards policies, so clients in low-paying jobs can retain their eligibility longer and can continue to supplement their earnings with welfare benefits. (However, this may also imply that they more quickly reach the time limits imposed under TANF.) In contrast, Texas is a low-benefit state, and individuals who are in low-paying jobs and working part-time can lose all welfare benefits immediately.

LOW WAGES, BUT HIGH COSTS TO WORK: WHAT TO DO

What can job retention programs do?

- Help find child care subsidies or subsidized slots for those who need them
- Provide bus passes/tokens for commuting to work (at least for the first few months after job start)
- Pay initial employment expenses (for necessities such as clothing and tools)
- Provide support service payments for one-time emergencies (such as initial rent deposits, car repairs, or car insurance)
- Help clients plan efficient and inexpensive transportation routes
- Promote use of the advanced pay option of EITC, so low-income earners can have more cash in hand
 - Program staff will need training in order to understand and promote the advanced pay option of EITC.
 - Program directors may want to designate one or two caseworkers (or accountants from the tax office) to provide this help and have them work closely with job retention program staff.
- Help clients obtain available transitional benefits they need

What can state/local agencies do?

- Have state EITC for low-income workers; have more generous disregards policies but be aware that this would lead to quicker exhaustion of time-limited benefits; provide earnings supplements to bring income near or above poverty level (New Hope Demonstration Program, WI*)
- Deduct costs such as child care, transportation, and housing from income for purposes of benefit calculations
- Make full use of available child care block grant or other child care dollars
- Make transitional Medicaid accessible or other public health insurance available
- Put more dollars toward low-income housing
- Collaborate with other agencies such as HUD to interpret their state TANF policies to enable clients to qualify for income exclusion from these other agencies (Families First Program, TN*)

B. CHALLENGE: AFFORDABLE, RELIABLE CHILD CARE

Finding reliable and affordable child care is a challenge for welfare recipients, just as it is for other working parents. For welfare recipients, however, the process can be more complicated; their child care needs are often made complex by the nature of their jobs and their inexperience with handling different types of child care crises or emergencies.

Like other users of child care, welfare recipients want reliable providers they can trust. Unable to afford the full cost of formal, center-based providers, and sometimes unwilling to trust providers they do not know, welfare recipients often depend on the availability of families and friends or other informal providers and have meager back-up choices. These arrangements often are tenuous, and they can quickly break down if a provider finds a job, moves, or cannot care for the child anymore.

Added to this mix is the fact that many welfare recipients have special needs that make it difficult for them to find suitable child care. Some of their children may have been abused, so they may be less willing to leave them with others. Some have children with physical or mental disabilities and find it difficult to leave them with a child care provider. Although absences from work when children are sick can affect job performance, many welfare recipients obtain jobs that do not offer paid leave and have little flexibility to adjust their hours to stay at home with a sick child.

"I was always taking off because I couldn't take him [sick child] to day care and I had nowhere to leave him."

-- PESD Focus Group Participant

Many of the jobs that welfare recipients find in food service, retail, hotel, and health aide fields involve nonstandard hours (including evenings and weekends). In these fields, hours and schedules frequently are adjusted to accommodate fluctuating workloads. Finding reliable and affordable child care providers that are flexible enough to match parents' work hours and schedules is difficult.

The states' main response to the child care problem has involved funding and providing child care subsidies. At the time of this study, the availability of child care funds varied widely across states. Because the new welfare law provides block grants for child care, the funding aspect of the child care problem may have become less critical.

Beyond funding issues, however, are bureaucratic snags that can hinder simple and quick access to funding. For instance, a state may provide different funding for child care based on a client's welfare reciprocity status and employment status. Individuals who are both on welfare and employed may have to fill out different forms for different portions of child care subsidies. These forms need to be submitted regularly so payments can be made to providers on time. For those who do not have steady jobs or work different hours each week or use more than one provider, the large amount of required paperwork can lead to delays in or errors in paperwork. Providers who are not paid on time may refuse to provide further care.

What can job retention programs do?

- Review child care arrangements with clients and help plan alternatives; provide lists of providers, especially those with subsidized slots and convenient locations; maintain hotlines to child care referral services, especially for infant care
- Ensure that welfare recipients make contingency plans and back-up arrangements for child care; help plan for child care arrangements after transitional care ends
- Help identify and access funds/subsidized slots and help with paperwork; remind clients to get paperwork in on time; encourage those who are eligible for and need subsidies to use them
- Establish good interagency communications so retention program staff can help straighten out child care payments in a timely way

What can state/local agencies do?

- Ensure easy and quick access to child care benefits; integrate different funding sources and make eligibility and access rules consistent across eligibility categories; make sure child care payment staff resolve errors quickly
- Enact family leave policies so individuals with sick children can take time off to care for them; promote benefits like paid vacation, to provide flexibility to deal with child care crises
- Increase the number of centers with subsidized care, especially along heavily used transportation routes, so it is more convenient to drop off and pick up children on the way to work; increase supply of care for infants in general and various types of child care in rural areas where supply is low; expand number of facilities that provide care during nonstandard hours (Centerville Cluster Day Care Diversion Project, IA*)
- Create a child care resource and referral system sensitive to the needs of the welfare-to-work population. For example, Child Care Solutions, GA,* provides information, assistance, and training to caregivers and educates parents and the community about the importance of expanding affordable, high-quality child care. Help welfare recipients define their child care needs, make matches with providers, establish back-up care, and follow up to monitor progress.
- Train welfare recipients to become child care workers. School Age Child Care, CT,* provides pre-service and in-service training and places participants with a child care or school-run program on completion. Other examples: Lincoln Action Program, NE*
- Help child care providers address areas of concern. Child Care Support Network, RI,* provides support to child care professionals and encourages collaboration among community agencies, child care providers, and families.

C. CHALLENGE: TRANSPORTATION, THE CRITICAL LINK

Fragile and complicated transportation arrangements can impede welfare recipients' ability to get to work on time. For instance, about 25 percent of PESD sample members reported that problems with transportation made working difficult. Some welfare recipients live or work in areas poorly served by public transit. Others work evening or night shifts, when public transit is limited. For such individuals, many available jobs may not be accessible. Some arrangements involve multiple connections, so slight delays can create missed bus or train connections and cause lateness for work.

Owning a car does not always solve the transportation problem fully. Those who own cars often have old ones, which may break down and entail large repair bills. For instance, a few PESD focus group members reported having to quit their jobs when their cars broke down, because they could not afford the repairs and could not get to work any other way.

Some welfare recipients have to travel long distances to work. In many areas, new jobs (especially service-sector jobs) are being created in the suburbs, but three out of four welfare recipients live in cities or rural areas. Getting to suburban jobs can be particularly difficult: public transit routes between cities and their suburbs are rare and, where they do exist, are often long and circuitous. Many welfare recipients who live in rural areas have access to private transportation, but those who do not find it extremely difficult to get to jobs, since public transportation in these areas is even scarcer. Furthermore, if welfare recipients have to drop children off at child care centers, then transportation arrangements become even more involved.

“In order to go to work, I have to have a car. There’s no bus that goes from (X) to (Y).”

-- PESD Focus Group Participant

Evening- or night-shift workers face their own set of transportation barriers. Usually, public transportation is not a viable option because of low service frequency during off-peak hours. In addition, people who work evening or night shifts may feel unsafe taking public transportation or waiting at bus or train stops at odd hours.

Some individuals depend on friends or neighbors for rides. Often, they have few back-up arrangements, leaving them stranded when friends or coworkers cannot drive them on a given day. Others have complicated arrangements, and PESD focus group participants often reported how these complicated arrangements were more prone to failure and frequently made them late for work.

What can job retention programs do?

- Review transportation arrangements, provide bus and train schedules, and help clients figure out the most efficient route to child care and work; teach clients how to plan travel
- Ensure that clients have made contingency plans/back-up arrangements
- Provide temporary assistance to deal with car repairs for those who need assistance

What can state/local agencies do?

- Provide monthly transit passes or other forms of safe, free, and reliable transportation for at least the first few months after job start (WorkPass Program, NJ*)
- Enhance city-suburb transit options; provide subsidized bus/van services from inner-city areas to where the jobs are; encourage or contract for transportation service from existing transit agencies; promote employer transit initiatives; train welfare recipients to become van company owners (AdVANtage Van Service Entrepreneurs Project, MD*)
- Help welfare recipients who find jobs obtain reliable transportation. For instance, provide auto loans, help with down payments on cars, or make available reliable pre-owned cars at low cost or through lease-purchase programs to welfare recipients (Job Opportunity Transportation Program, CA*; Wheels for Work, MD*; Cars Assist Recipients in New Grants (CARING) program, VA*). This assistance can be targeted to those whose only barrier to work is transportation.
- Expand transit service, including route extensions, increased evening and weekend service hours, feeder-shuttle service, evening shared-ride taxi services (Job Ride, WI*)
- Establish a database to serve as a transportation resource and referral system (Community Self-Sufficiency Grant, IA*); create a clearinghouse to improve coordination and provide central dispatch among existing transportation options (Job Ride, WI*); set up resource centers displaying transit time tables, maps, guides, and informational brochures on special services (Work Pass Program, NJ*)

D. CHALLENGE: AFFORDABLE HOUSING

Finding safe and affordable housing can be a major challenge for all welfare recipients, including those who find jobs. Housing challenges for welfare recipients who find employment include (1) shortages of public housing near job locations, (2) social ills in high-poverty neighborhoods, (3) reductions in housing subsidies, and (4) unstable living arrangements.

In addition to being in short supply, public housing projects usually are not in the same areas as jobs. The high concentration of poverty and high rates of drug abuse, criminal activity, and unemployment in areas where public housing projects are located can affect welfare recipients' abilities to hold onto their jobs. Individuals in these neighborhoods often feel unsafe taking jobs during nonstandard hours, when transit frequency is highly limited. Furthermore, they are constantly concerned about safety for themselves and their children. In addition, these areas have few role models and lack a peer structure that can provide positive incentives to find and sustain employment.

Nearly one in four welfare recipients receives housing subsidies. As their earnings increase, they are likely to see reductions in their housing subsidies. Many individuals in the PESD sample lost housing subsidies when they started working, and about one-fifth reported that housing was a problem affecting their ability to hold a job. Rent can represent a high fraction of a household's expenses, and the loss of housing subsidies can make it hard to feel any of the benefits of earning a paycheck. Those who receive no housing subsidy are paying a large fraction of their available income toward housing.

"I live in Section 8 housing. I just went to my review; they kicked me off [of the rent subsidy program]. I was paying \$125 a month rent. Now I have to pay \$450. There is no way that my income tripled. I'm probably a quarter ahead of what I was. You go ahead and get a job, but you still get screwed."

-- PESD Focus Group Participant

Some have unstable living arrangements and reside with relatives or share an apartment with a friend, boyfriend, or other nonrelative. These arrangements can be tenuous. For instance, a few PESD participants reported being stuck with larger rents when these arrangements broke down, when relationships ended, or when housemates decided to move out with little notice.

What can job retention programs do?

- Do a household budget to determine the amount available for housing; review fraction of income going toward housing and advise clients of the optimal amount of income to spend on housing; review household arrangement to determine its stability; provide referrals to housing agencies if necessary
- Determine if clients may be eligible for some housing subsidy; if so, refer them to housing agency and follow up if necessary
- Help clients with paperwork or other assistance needed to help them access available housing subsidies

What can states/local agencies do?

- Concentrate availability of services that make it easier to work (such as child care, transportation, and family counseling) around public housing projects and other low-income areas
- Promote transportation linkages between low-income housing areas and suburban employment centers
- Establish closer links between welfare agencies and Housing and Urban Development agencies (more than 60 percent of public housing residents are welfare recipients)
- Temporarily freeze public housing rents or provide more tenant-based assistance and vouchers so that recipients can rent places closer to where the jobs are. The Time Limited Rental Assistance Program, CT,* and Work First New Jersey Housing Assistance Program, NJ,* provides housing subsidies to participants for three years (with a 55 percent subsidy in the first year, decreasing to a 35 percent subsidy by the third year). Other examples: Seattle Jobs Initiative--Housing Program, WA*
- Give priority to the most pressed; emphasize helping those who are spending more than half their income on housing, who are homeless, or who are living in seriously substandard housing
- Provide opportunity for low-income and welfare families to eventually own their own homes (Lease Purchase Program, OH*)

E. CHALLENGE: COPING WITH BUDGETING

Disruptions caused by income volatility can add to the other challenges that newly employed welfare recipients face. As they start working, these individuals have to get used to new amounts of income, new sources and timing of income, and new costs. In addition, the nature of the jobs that many welfare recipients hold frequently causes fluctuations in earnings and income from week to week. Furthermore, complicated welfare rules for reporting earnings add to fluctuations in their already volatile income, making the budgeting challenge even more complicated. Overall, about one-third of PESD clients reported financial or budgeting issues as a problem that affected their ability to hold their jobs.

Many welfare recipients' hours vary from week to week to accommodate fluctuations in demand for their time. Resulting changes in earnings and benefit levels can strain welfare recipients' budgeting skills. Not knowing the size of their next paycheck and benefit supplements, they can have difficulty planning their expenses. For instance, PESD sample members sometimes did not estimate correctly the effects of these changes in hours on their income and found themselves unable to pay for essentials.

Welfare rules for reporting earnings often pose challenges for those making the transition from welfare to work. Errors in grant adjustments can further complicate budgeting challenges during the initial transition. For instance, under the old welfare law, clients with earned income had to file monthly (or quarterly) reports to maintain eligibility for welfare benefits, and any delays in receiving these forms or errors in them could lead to errors in benefit payments.

It is likely that many states will continue with initial reporting requirements. Welfare agency errors and client errors in not reporting earnings changes promptly can lead to errors in calculating benefits. This sometimes creates overpayments, which agencies must recover either through making small grant changes in subsequent months or through recouping some part of the grant amount, or underpayments, particularly when benefits are ended prematurely. Thus, available income may swing back and forth. These types of errors can also put other forms of transitional support in jeopardy by affecting eligibility for housing assistance, food stamps, and so on.

Some state accounting systems can aggravate the volatility in income that newly employed welfare recipients experience. Some states have prospective reporting requirements, where benefits are calculated on the basis of what clients *project* their earnings will be. Prospective calculations can sometimes lead to benefit reductions for the next month, but a reduction in actual hours worked may cause earnings to be lower than anticipated. This can lead to financial stress for individuals who have lower income than expected just as they start working. In many cases, welfare payments are also reduced based on projected earnings, but it may be a while before the client receives a first paycheck, leading to a long gap in earnings.

One way of increasing monthly disposable income for those with low earnings is the advanced payment option of the EITC. Many PESD sample members were not aware of the advanced payment option of the EITC. Some of the case managers were reluctant to encourage use of the advanced payment option for fear that clients might end up with a large tax payment at a later date (in reality, a very low risk).

What can job retention programs do?

- Help clients develop a monthly budget; provide forms for budgeting showing total income, total expenses, and unmet need or surplus; promote the concept of saving some income for rainy day funds and the importance of planning and money management
- Provide short-term support service payments to deal with emergencies related to initial rent, car repairs, money for food, and so on; have clients make partial payments or make a plan for how to come up with the needed money. Payments can be made directly to the vendor or to the client as the situation dictates.
- Inform clients about transitional benefits and what they must do to retain eligibility; teach clients how to fill out forms and the importance of reporting earnings and delivering paperwork on time
- Teach clients to advocate for their own interests with income maintenance workers. Assist clients as necessary. Establish good communications with other agency staff (such as income maintenance workers) who can sort out errors for clients in a quick and timely way.
- Promote awareness of the EITC and advanced payment option; provide referrals to free tax centers that help with tax and EITC issues
- If appropriate, intervene with credit agencies, telephone companies, or landlords to sort out problems; help arrange a payment plan that the client can manage

What can states/local agencies do?

- Train staff to minimize benefit payment errors as welfare recipients increasingly cycle on and off welfare; heighten income maintenance staff's awareness that correct payments will make the transition to self-sufficiency easier
- Designate key income maintenance staff members who know how to correct different payment errors quickly; make these staff members easily accessible to employed clients and available during nonstandard hours
- Consider alternatives to prospective budgeting (such as retrospective budgeting), given the tenuous nature of the jobs many welfare recipients hold
- Provide clear information on eligibility issues around the time of the transition and their implications for budgeting, especially in states with prospective budgeting
- Consider providing small, one-time bonuses at job start to help clients cope with benefit reductions while they wait for a first paycheck; consider providing other bonuses for those who have held onto their job for a certain length of time (such as 3 months, 6 months, or 1 year), possibly in the form of a savings account, ensuring that these payments do not count toward TANF time limits.

F. CHALLENGE: WORKPLACE DEMANDS

In going to work, welfare recipients confront new challenges. They must try to understand workplace norms and deal with workplace situations new to them, perform well in the tasks they are expected to do, and avoid conflicts with coworkers or supervisors.

Some welfare recipients who find jobs, especially those with limited work experience, do not fully understand employers' expectations. Tardiness and failure to comply with work schedules are common reasons for job loss. In some cases, failure to comply with work schedules results from personal crises. However, some individuals have had little exposure to workplace situations and do not realize that good attendance and showing up on time are essential to holding a job. They often compound the consequences of their absences by not notifying employers when they are out.

Although many welfare recipients find entry-level jobs with modest skill requirements, they still must meet performance standards. While some can, others encounter challenges they cannot meet and become frustrated when they have to deal with unfamiliar work situations and when coworkers or supervisors are not available to help them. Some PESD sample members reported feeling underqualified or insecure in their jobs when they compared themselves with their coworkers.

“At my job I’m in charge of a lot of people’s lives. . . . I had to pretend like I know what I was doing. I knew that was part of doing it. . . . I was scared but at lunchtime I would go home, like a safety thing.”

-- PESD Focus Group Participant

Some welfare recipients who start working perceive favoritism in the workplace or feel that coworkers intentionally undermine them; others are frustrated at limited opportunities for advancement. Those hired by temporary agencies or in temporary positions feel particularly frustrated. In general, they receive few or no fringe benefits. In addition, many get discouraged when their positions do not become permanent. Lack of tenure contributes to some individuals' job detachment and makes it hard for them to put the same effort into their jobs as permanent workers.

Finding jobs that match skill levels and offer a convenient location or work schedule is also a challenge. Some welfare recipients lack the skills for jobs they are interested in and feel they need more education or training before they can find jobs that they can hold. Illegal behavior, past and current, can prove a stumbling block for some in establishing regular employment. A PESD participant reported how her past criminal record of shoplifting 13 years earlier cost her a job as a nurse's aide.

PESD case managers said few clients wanted them to mediate issues with their employers. Some clients felt such contact suggested they were incapable of dealing with their own problems; others felt it would reveal their status as welfare recipients and undermine their independence.

“I said that I really didn’t want them to be involved [with employer]. I wanted to try to handle it the best way I knew how.”

-- PESD Focus Group Participant

What can retention programs do?

- Increase awareness of workplace culture, requirements, and acceptable behavior through individual counseling and workshops; provide guidance on how to talk to employers, coworkers, and clients
- Ask clients about potential and emerging workplace issues they might be facing
- Conduct workshops and peer group sessions on workplace attitudes and behavior, how to talk to employers and coworkers, how to dress, and other issues of interest to working mothers (with role models and playacting); encourage sharing of experiences and resolution of issues by individuals with similar concerns.
- Attempt employer mediation (with clients' approval). Securing approval will be difficult, however, and mediation may be more acceptable if provided by nonwelfare agents, such as guidance counselors from employment agencies.
- Identify low-skill clients who may need/benefit from skills training; facilitate such training or provide referrals

What can states/local agencies do?

- Make working in temporary jobs more attractive by requiring employers to provide some minimal fringe benefits; enact or enforce state laws to prevent employers from keeping temporary workers for long periods without making them permanent, to avoid paying benefits; encourage employers to provide some minimal fringe benefits for part-time workers
- Encourage employers who hire welfare recipients to provide them with some mentoring in the workplace
- Increase employer involvement in hiring and promoting retention among welfare recipients; promote employer participation by providing employer incentives (such as tax credits) to hire welfare recipients; identify model programs of employer involvement that seem to be effective (such as Marriott, United Airlines, Goodwill Industries); focus greater attention on such programs
- Encourage service providers who are training welfare recipients to also provide life skills and training on workplace attitude, behavior, and expectations.
- Encourage the formation of Employee Assistance Programs (EAPs) for small businesses that hire welfare recipients and may not be able to afford their own EAP. Encourage the formation of EAPs to serve several small businesses, and for counselors from these EAPs to take a proactive role in helping resolve workplace conflicts.

G. CHALLENGE: PHYSICAL HEALTH, MENTAL HEALTH, AND SUBSTANCE ABUSE

Many welfare recipients have health problems that discourage them from working or lead to job loss. For instance, nearly 25 percent of the PESD sample members reported being in poor or fair health. About 18 percent reported that their health problems made it difficult for them to hold onto their jobs.

Some recipients have a mental illness that makes it difficult to maintain employment. Others have children who are physically or mentally ill, which makes it difficult for them to cope with responsibilities on the job and at home.

“I finally got my daughter in a program where someone comes and spends two or three hours a day with her. I almost quit my job several times; when she calls me at work and says I’m gonna kill myself and I try calling back home and there’s no answer, it’s like, OK, do I stay here and hope she’s alive when I get home, or do I try and leave? I’d been at my job for almost three weeks. Are they gonna understand this kind of thing? It was really difficult.”

-- PESD Focus Group Participant

Drug and alcohol abuse is a problem for some welfare recipients. In PESD, it surfaced in the small samples of clients reviewed in our case history conferences and in discussions with case managers. Case managers suspected substance abuse problems in more cases; however, only a few clients were willing to talk about these problems, reflecting general reluctance among people to reveal drug and alcohol abuse problems.

Depression is another problem for welfare recipients. For some PESD clients, going to work was a change in identity that was hard to accept. Some clients were elated when they received a job offer, then fell into a depression soon after starting the job. Staff members felt that this depression was related to the increased strain in their lives and the feeling of being overwhelmed by all the problems associated with balancing work and home.

Some individuals return to welfare to receive Medicaid coverage, because they lack employer-provided health insurance or have difficulty paying their share of the premium. Although welfare recipients who find jobs are entitled to transitional Medicaid for at least a year, participation rates are low, and many welfare recipients do not use it. Many are unaware of the availability of benefits or do not know how to qualify for them. Some individuals may not want to deal with the paperwork and other procedures associated with receiving transitional Medicaid.²

²Ellwood and Adams (1990) discuss reasons for low participation rates in transitional Medicaid.

PHYSICAL HEALTH, MENTAL HEALTH, AND SUBSTANCE ABUSE: WHAT TO DO

What can job retention programs do?

- Ensure access to transitional Medicaid or other publicly subsidized health insurance for low-income individuals; help plan for available options after transitional Medicaid expires; help obtain other health insurance or access to an HMO
- Refer clients for mental health services if they exhibit severe anxiety and behavior problems or if their children have problems; maintain ties to professional therapists (located in the program office or easily accessible) who can counsel clients; refer clients with substance abuse symptoms to appropriate treatment and counseling when such services are available

What can states/local agencies do?

- Extend transitional Medicaid to the working poor to provide medical subsidies after transitional benefits end (Maryland, Minnesota, Vermont, Wisconsin); provide subsidized health insurance that phases out gradually as earnings increase; deduct health insurance payments from income for purposes of benefit calculations
- Increase health coverage for children and families; remove bureaucratic and other barriers that restrict access to needed services (Educational Outreach Initiative, SC*)
- Analyze reasons for low take-up rates in transitional Medicaid and promote participation; educate different groups about transitional medical benefits; increase outreach efforts and simplify and expedite the process of determining client eligibility to ensure that Medicaid-eligible people are identified correctly and enrolled
- Provide intensive and specialized case management services to clients with mental health problems or substance abuse problems
- Form close ties with vocational rehabilitation departments; provide appropriate employment and vocational training placement for those with physical and learning disabilities (Supported Employment Program, NJ*; Job Training and Rehabilitation Services Project, OH*)
- Provide advanced training to case managers for identifying, working with, and making appropriate referrals for clients with disabilities, mental illnesses, or substance abuse problems. For instance, Wisconsin Works (W2)* links with the Department of Vocational Rehabilitation to serve welfare clients; Learning Disabilities Initiative, KS* provides training and assessment tools to welfare case management staff to help them identify service delivery strategies for clients with disabilities. Other examples: Nevada County GAIN Employment Services Program, CA*; Oregon JOBS program, OR*; Family Employment Program, UT*; Substance Abuse Research Demonstration Project, NJ*

H. CHALLENGE: PERSONAL SUPPORT SYSTEMS

Personal factors can compound the emotional strain of transitions from welfare to work. These factors include lack of personal support from family and friends, stress on children's lives, other family issues, and physical abuse.

The strength of their support network influences welfare recipients' ability to endure the challenges they face. Some have strong emotional supports and have friends or relatives who can provide practical assistance (for example, giving them rides to work or taking care of their children in emergency situations). These individuals can help welfare recipients weather crises that might otherwise lead to job loss. Other recipients, however, have friends or relatives who resent their decision to work and who cannot adjust to their increased self-reliance. PESD clients reported that such lack of support or rejection from family members and friends created additional emotional strain and sometimes even threw them into depression soon after they started working.

Starting a job can sometimes impose stress on children's lives. Individuals who work nonstandard work schedules have much less contact with their children. Several PESD clients noted that working placed strains on their families. Some clients reported that their jobs required leaving home before their children awoke and returning home after they had gone to bed. Others worked Saturdays and Sundays and had little time to spend with their children when they were not in school.

Abusive and violent relationships tear at the lives of a substantial number of welfare recipients. In some cases, boyfriends or ex-husbands become abusive in reaction to a woman's growing independence as she enters the job market. Some PESD sample members reported that some men demanded that these women quit their jobs and physically abused them when they refused to do so. These experiences added stress to their jobs and their welfare-to-work transition; in some cases, it led to job loss.

"There was just nothing else I could do except return to public assistance, unless I just stayed back there and let us be abused. I've always wanted to work. My ex-husband just wouldn't let me."

-- PESD Focus Group Participant

In some cases, abuse can be more long-standing and less obviously related to welfare recipients' employment. The effects on employment tenure, however, are similar. For instance, at least two PESD clients whose histories we reviewed moved out of town when their former partners returned and began to abuse them. These clients had to give up their jobs and look for new ones near their new homes.

Other less violent family crises can also undermine prospects for welfare recipients' continued employment, particularly when individuals are unable to contain the crises and separate them from their work lives. For example, a PESD client took time off from work to attend a cousin's funeral, annoying her supervisor and jeopardizing her position at work. Other clients were engaged in prolonged divorce or custody battles.

What can job retention programs do?

- Provide counseling and morale boosting; serve as a sounding board for clients who have little personal support and want to talk about crises or problems they are facing
- Identify voluntary agencies or groups that have mentoring components and refer clients to these groups; form extensive networks with available resources in the communities and provide referrals to clients
- Provide referrals to shelters or safe houses or to organizations that have such services
- Provide referrals to free legal assistance when clients are suffering from physical abuse or domestic violence
- Assess the social support needs of each client and provide outreach and crisis management support

What can state/local agencies do?

- Train eligibility workers and case managers to identify victims of domestic abuse and on how to address the subject of domestic violence with clients (Domestic Violence Awareness Training and Service Planning, MD*; Domestic Violence Plan, OR*; Options/Opciones Program, IL*); form a team (including job counselors, welfare caseworkers, social workers, and child care workers) to treat the case and take a holistic approach to providing services; provide assistance in accessing temporary shelter or a restraining order (Model Office Project, CO*; Domestic Abuse Intervention Project, MN*)
- Encourage the establishment of community groups that provide mentoring and other social support for low-income individuals and those trying to make the transition from welfare to work; work with employers and focus these efforts at job sites, since working parents might find it difficult to add mentors to their lives; to avoid stigma, establish mentoring for all low-wage workers, not just welfare recipients
- Provide intensive and specialized case management to clients with family crises or legal difficulties by providing crisis counseling, support dealing with stressful situations, and referrals to specialized community resources (Nevada County GAIN, CA*)

I. CHALLENGE: LOSING A JOB, SEEKING NEW EMPLOYMENT

Many welfare recipients who find jobs lose them fairly quickly. For instance, one out of four sample members had lost their initial jobs within three months, and nearly 60 percent had lost their jobs by the end of a year. These individuals often sought new employment, either on their own, or with pressure and help from case managers. Some who held onto their jobs nevertheless sought new jobs with better pay, hours, fringe benefits, job security, working conditions, or job location.

Two factors affect efforts to find new jobs: (1) mismatches between aspirations and qualifications, and (2) inadequate job search skills and resources. It is difficult for some welfare recipients to find a job because they want to enter fields in which they have little or no background; they have little clear information on the occupations or the associated education and experience requirements. Some have few basic skills and cannot readily obtain jobs.

Many welfare recipients who are unemployed lack important job search assets (such as self-confidence and job search skills). Others are more confident but have difficulty communicating clearly, describing their relevant qualifications, and completing job applications neatly.

“I still haven’t found a job in two months, going on three. . . . I’ve been to about 40 different employers. . . .”

-- PESD Focus Group Participant

Welfare recipients also face logistical hurdles in their job searches. Many lack practical resources (such as transportation and access to a telephone) that are important while hunting for a job. Some PESD clients, for instance, were qualified for jobs with employers in isolated areas but could not go for interviews because they did not own a car. Others needed someone to watch their children while they were on job interviews; although child care funding was sometimes available, clients still had to arrange for this care.

Several welfare recipients have no telephone or had their service cut off for nonpayment. Although they usually can make calls from the telephone banks in the local job placement offices, they have difficulty receiving calls from potential employers. In some cases, their lives and their job search efforts get disrupted when they move from their place of residence. For some PESD clients, moving cut into the time that they could devote to job search and also complicated, at least temporarily, the process of calling employers and receiving calls from them.

What can job retention programs do?

- Make job search assistance a critical component of job retention programs; strengthen links between welfare and employment agencies
- Monitor to detect job loss through periodic employment verification (such as once every 30 days for the first six months) or through the TANF payment system to see if earnings have been deleted from the case benefit calculation
- Contact clients to give them job leads; provide referrals to job placement workers or job clubs and follow up on clients' progress
- Encourage training for individuals who are working part-time or in low-paying jobs, so that they can eventually move on to better jobs
- Encourage clients to share job leads and provide small financial incentives for successful placements (Illinois Department of Human Services)

What can states/local agencies do?

- Improve access to reemployment services for all, regardless of welfare status. Provide job search assistance and resources for recipients who have lost jobs without making them go back on welfare.
- Provide payments for child care and transportation for those seeking jobs or job-upgrading, including current and former TANF recipients
- Form closer ties with DOL and other state employment agency staff
- Provide job banks and one-stop career centers or encourage use of such resources that are already available so that clients can easily access job leads
- Promote the hiring and retention of welfare recipients by employers; provide additional subsidies if necessary; link with chambers of commerce and other representative groups to obtain information or buy-in; use state or federal tax subsidies if necessary
- Set up job creation programs in times of bad/adverse labor market conditions

III. SETTING UP JOB RETENTION PROGRAMS

Some states, recognizing the challenges TANF recipients face in moving from welfare to work, are considering setting up job retention programs. The operational experiences of PESD offer valuable lessons to help guide state and local agencies in such efforts. This chapter focuses on six key questions that state and local agencies must consider as they attempt to provide job retention services to employed welfare recipients:

1. Who to serve?
2. What types of services to provide?
3. How to deliver services?
4. How much to promote services?
5. When to provide services?
6. Who will run the programs?

For all of these questions, agencies will have to make choices. In this chapter, we briefly describe how the PESD programs were set up with respect to each question, suggest key alternatives, and discuss the main features associated with each choice.¹ Where relevant, we also provide operational suggestions for programs considering different choices.

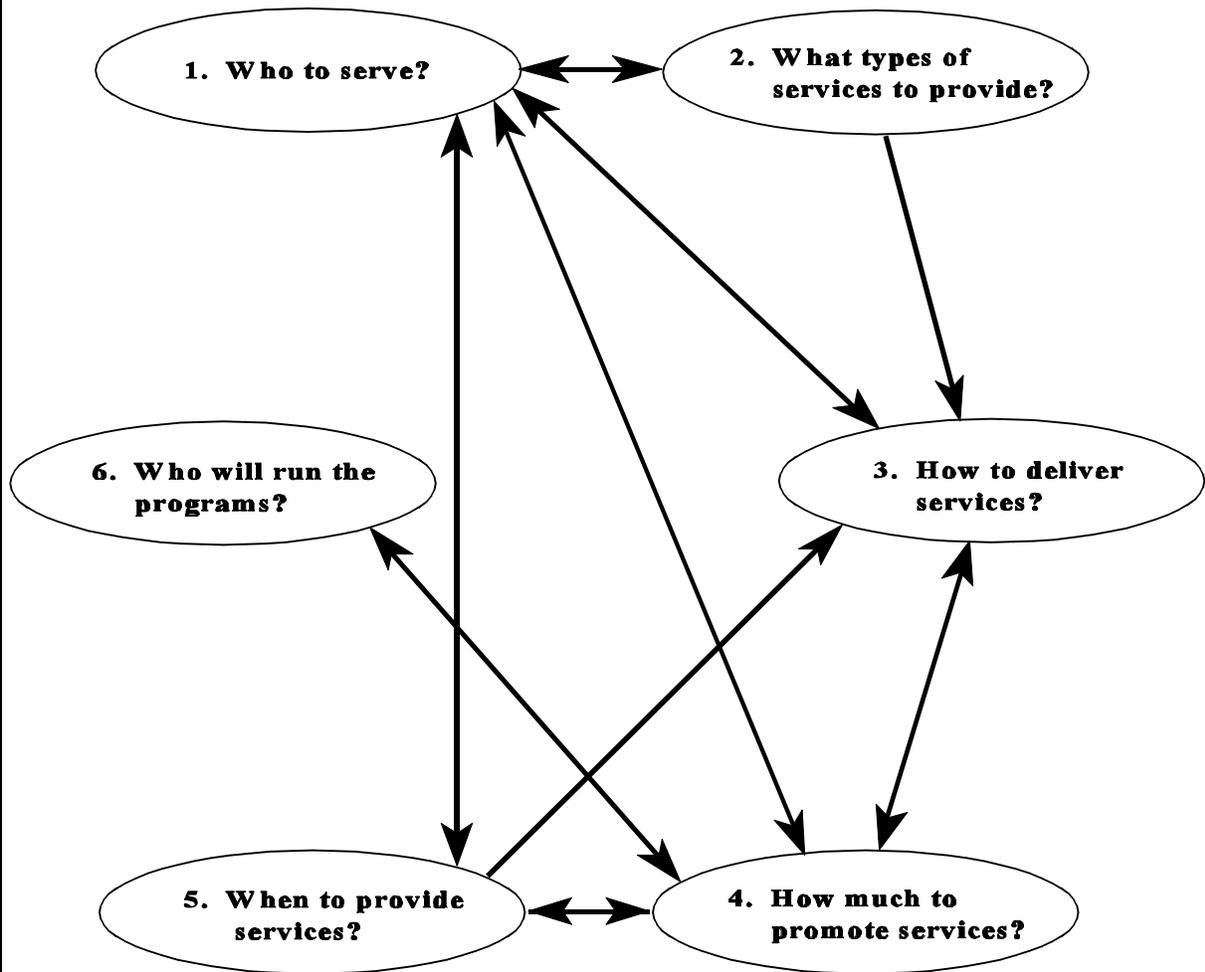
Please keep two considerations in mind while reading the next six sections. First, the goal of these sections is not to provide a comprehensive listing of all possible choices that relate to each issue. Rather, the goal is to focus on some key alternatives and to point out trade-offs that will have to be considered. Clearly, the approach that makes the most sense for any particular agency will depend on local circumstances, the primary goals of the program, and available resources.

Second, these six questions are highly interrelated (Figure 4). The choice for any one of these questions has implications for the feasible or best choice for the others. For instance, a state may decide to set up a job retention program that provides case management services. This then has implications for the target population it can most easily serve. Alternatively, a local agency may decide that it wants to contract for job retention services. This then may have implications for the ease with which participation in the job retention program can be made mandatory, since contractors may find it difficult to enforce participation. Some combinations of choices go better together or can be implemented more easily, and we indicate these throughout the chapter.

¹In most instances, we have a plus or a minus sign in front of each main feature to indicate key advantages and disadvantages associated with the choice. However, each program that is set up will be different; whether a specific program considers a feature a plus or a minus would depend on its goals and resources available to meet the goals.

Figure 4

Interrelations Among Program Design Decisions



A. WHO TO SERVE?

The PESD programs served JOBS participants who had recently found jobs, whether or not they continued to receive welfare after job start. The rationale for this decision was that recipients who find jobs, including those who leave the welfare rolls, are likely to face challenges of job retention.

One key question is whom the job retention program should serve. For instance, should services be provided to:

- *All welfare recipients who find jobs, regardless of welfare status soon after job start?*
- *Only those welfare recipients who continue to receive welfare while employed?*
- *More narrowly targeted clients (those with certain individual characteristics related to education, work history, or other variables)?*

Closely related to the question of whom the program should serve is whether or not the program will include case management services (Question 3) and how much the program wants to promote services (Question 4).

Summary: Who to Serve?

- Menu choice: Serve all newly employed clients or only selected clients
- Trade-off depends on:
 - Program goals; resources available; characteristics and needs of welfare recipients in area
 - Types of services being considered and how they might be delivered, as well as how much the programs are planning to promote services
- Possible strategy:
 - Serve all employed individuals still on TANF
 - Select targeted high-risk clients for ongoing intensive services, regardless of their TANF status
 - Make available less-intensive job retention services for all TANF recipients who find jobs

WHO TO SERVE?

Option 1: Serve All Welfare Recipients Who Have Found Jobs, Including Those Who Leave Welfare

- + **Ensures coverage of all who might need job retention services.** Many who exit welfare through work lose their jobs and return to welfare. Since individuals' needs may not always be clear up front, providing job retention services to all who find jobs ensures that agencies are covering all clients who can potentially lose their jobs and are thus in a position to identify emerging problems and provide appropriate services.
- **Serving all employed welfare recipients can be fairly costly.** Employed welfare recipients' needs vary. To the extent that not all clients need assistance (or, at least, intensive assistance), it may be more efficient to focus available resources on those who most need assistance.
- **May be difficult to operationalize on a large scale.** Setting up a job retention program for all recipients who find jobs may be logistically difficult. The staffing needs and other logistical support requirements are substantial, especially if case management services are being considered. Furthermore, some individuals may leave welfare without reporting employment. Such individuals may be unlikely to participate in any job retention program, especially if welfare agency staff run the programs.

Option 2: Serve Only Clients Still Receiving Financial Assistance

- + **Easy-to-identify group and more likely to be in need of services.** Since they are still receiving public assistance, these employed individuals are more likely to have low-paying jobs and, in general, to need retention services. Furthermore, it may be easier to identify them and to provide certain services (such as group workshops).

Option 2: Serve Only Clients Still Receiving Financial Assistance (*continued*)

- + **Less costly.** Since this group is a subset of all welfare recipients who find jobs, program costs will be lower than if services also extend to those who leave assistance. However, this cost advantage may not be very large if states have generous benefits or disregards policies that allow a large fraction of those employed to continue to receive welfare.

- **Providing services only to those on welfare may be shortsighted.** While this seems to be a clear group to target, providing job retention services only to those still on welfare may lead to ignoring others who need services. For instance, past studies have shown that between 25 and 40 percent of welfare recipients who have found jobs *and left welfare* are back on welfare within a year after exiting. Moreover, who gets covered will vary widely by state, depending on the generosity of the state TANF program. It may be prudent to provide some assistance, at least to the least skilled or experienced welfare recipients who find jobs, to help prevent job loss, rather than to wait to provide them assistance until they lose their jobs and return to welfare.

Option 3: Target Clients Based on Apparent Risk Factors, Regardless of Reciprocity Status

- + **Most efficient use of resources.** Not all welfare recipients who find jobs will need job retention services. Targeting services to those individuals who seem most at risk of job loss, whether or not they still receive TANF, may be the most efficient use of agency resources.

- **Difficult to identify who needs and can benefit most from services.** It is difficult to accurately predict who these individuals are, and additional research that evaluates the effectiveness of services targeted toward different groups of individuals is needed.² The next page, however, provides some operational suggestions related to targeting.

²Rangarajan, Schochet, and Chu (1998) uses the 1979 to 1994 National Longitudinal Survey of Youth to examine individual characteristics that can serve as efficient targeting variables for programs considering job retention services.

WHO TO SERVE?

Hands On: Operational Suggestions Related to Targeting

Targeting, if done correctly, uses limited resources most effectively. However, little evidence is available about who most needs services or might benefit most from them. On the basis of existing research and program staff perceptions, we list some ideas below for states that might want to target job retention services to clients:

Targeting based on individual characteristics:

- *Target those who start in the lowest-paying jobs or jobs without key fringe benefits*
- *Target those with less than a high school diploma*
- *Target those with multiple barriers or risk characteristics*

Other approaches to targeting:

- *Target those who found jobs but lost them within a few months of job start*
 - Advantage: This group is an obvious high-risk group.
 - Drawback: It might have been possible to prevent job loss in the first place by intervening earlier.
- *Allow clients to choose whether or not they want services, as well as the intensity of services they might want*
 - Advantage: This is a group that seeks services, so programs will not have to do much outreach.
 - Drawback: Not all clients who could benefit from services may seek them out on their own.
- *Perform assessments either at time of job placement or soon after job start to determine whether clients face multiple barriers and may be at high risk for job loss*
 - Advantage: Placement case managers may have a good sense of clients' needs and their coping mechanisms.
 - Drawback: Individual needs at time of initial assessment may not predict later needs.

B. WHAT TYPES OF SERVICES TO PROVIDE?

Job retention programs can potentially offer a wide range of services to newly employed welfare recipients. Here, we provide brief sketches of the main types of services program planners could consider including:

- Job search assistance
- Child care, transportation, and housing assistance
- Resolution of benefit issues
- Counseling and support (including help with budgeting and contingency planning)
- Service referrals (including substance abuse/physical abuse/mental health)
- Support service payments for work-related emergencies
- Employer mediation
- EITC and tax information
- Career- and life-planning classes and workshops
- Information sharing through newsletters or other vehicles

Some of these services can easily be made available to all TANF recipients who find jobs. Other services that require a more intensive service delivery approach (such as counseling) may best be made available to selected individuals.

Summary: What Services to Provide?

- Offer a wide range of services, either directly or through referrals
- Take an individualized approach to service delivery
- Be flexible in services provided; do not provide a uniform package of services to all
- Selected services (such as job search assistance or benefit resolution) can be made available routinely to all those who have found jobs. Other more-intensive services (such as counseling) can be provided through case management for selected individuals in greatest need.

WHAT TYPES OF SERVICES TO PROVIDE?

Job Search Assistance

Given the high rate of job turnover, job search assistance must be an important component of job retention efforts. Immediate assistance needs to be given to those who lose their jobs or want better ones. These services can range from individualized job search assistance (such as specific job leads and general guidance on job search methods) to more structured activities (such as workshops and job search classes). Programs can also provide current and former TANF recipients access to *resource rooms* or one-stop career centers currently supported by U.S. Department of Labor (DOL) and other employment agencies. These resource rooms are convenient locations where individuals can look for job leads, use telephones to call employers, use computers or typewriters to update their resumes, and consult with staff on updating resumes and filling out job applications. Programs should also provide payments or vouchers for child care and transportation for former TANF recipients who have lost their jobs or are looking for better jobs (rather than only provide these payments when they are back on TANF), so that these expenses do not form a barrier to looking for better jobs.

Child Care, Transportation, and Housing Assistance

Child care, transportation, and housing are the three basic necessities that directly affect many welfare recipients soon after they obtain jobs. Retention programs should ensure that clients have stable and affordable arrangements in all three areas. Program staff could check basic arrangements, guide clients to available funding or subsidies for these expenses, provide referrals to agencies that deal with these necessities for low-income earners or employed welfare recipients, and ensure that clients have made appropriate back-up arrangements. Program staff should be trained so that they are fully aware of available resources and understand program eligibility issues. Program staff should also establish good communications with staff from these agencies so that problems can be straightened out in a timely way.

WHAT TYPES OF SERVICES TO PROVIDE?

Resolution of Benefit Issues

Soon after employment, welfare recipients can experience disruptions or errors in welfare benefits payments, as well as difficulty accessing transitional benefits they may need as they start working. Those working during standard daytime hours can find it difficult to take time from work to resolve problems with agency staff. Retention specialists or case managers can help clients apply for transitional benefits and resolve eligibility or benefit issues concerning welfare, food stamps, transitional Medicaid and child care, and housing. Again, retention program staff should be trained on eligibility issues and identify income maintenance or other eligibility workers who can help resolve issues in a timely way.

Counseling and Support

Individual counseling and support is likely to be a valuable service; it is the one that PESD clients appreciated the most. For many welfare recipients, starting employment was a new experience, and they had to deal with many new issues at the same time. Counseling can cover money management and budgeting, contingency planning, workplace behavior and new workforce issues, and personal problems (such as nonsupportive families and friends). Staff members also can provide encouragement and moral support to clients and give them opportunities to discuss their frustrations and problems.

Service Referrals

Clients may need assistance with a variety of services, including health care, child care, skill training, or education programs. Retention specialists should maintain a wide network of resources and provide clients referrals to child care providers and to training programs to supplement basic skills. They should also provide referrals to free legal aid and specialized individual or family counseling, including aid and counseling for substance abuse, mental health, and physical abuse.

WHAT TYPES OF SERVICES TO PROVIDE?

Support Service Payments for Work-Related Emergencies

Programs can offer payments for temporary expenses associated with starting work or with emergencies that can affect employment. Initial employment expenses include clothing, tools, shoes, and other work-related equipment that welfare recipients might need at job start. One-time emergency payments may be made for such items as car repairs, car insurance, and assistance with rent. Such assistance can prevent small emergencies or crises (such as having a car break down or not being able to afford suitable work clothes) from leading to job loss. Programs should attempt to ensure, however, that these small payments do not count against participants' time limits on benefit receipt.

Employer Mediation

While employer mediation may be a useful service that may have direct beneficial effects, the PESD experience shows that this service may be difficult to deliver. For instance, most PESD clients who found jobs did not want the case managers to call their employers, either because they did not want employers to know about their connection with welfare or because they did not want employers to assume that they needed external help dealing with their problems. This service may be somewhat easier to provide if welfare recipients have access to employee assistance programs or if the mediation is through an employment service than through welfare staff.

EITC and Tax Information

Retention specialists and other tax workers can help clients extend their paychecks by helping them receive the advanced payment option of the EITC and giving them other tax assistance. These services can be provided by retention case managers (if they have adequate training) or by other specialized income tax staff.

WHAT TYPES OF SERVICES TO PROVIDE?

Career- and Life-Planning Classes and Workshops

Since many employed welfare recipients face similar experiences as they start working, programs can attempt to organize periodic workshops that relate to career and life planning and dealing with new workplace issues. These workshops (or peer group sessions) could cover topics of interest to newly employed individuals, such as appropriate workplace behavior, how to work with coworkers and supervisors, and the importance of showing up at work on time. The experience from PESD shows that those who attend workshops value them; however, many find it difficult to participate due to time and other constraints. Consequently, it may be useful for employers to conduct or to be involved in having these types of classes and workshops at worksites. Such workshops could be made available to all new or entry-level employees, not just TANF recipients.

Information Sharing Through Newsletters and Other Vehicles

Programs can create newsletters or other informational brochures that contain valuable information related to job retention. These publications can be mailed to all current and former TANF recipients who have found jobs and also be made available at resource rooms or job training and life skills workshops.

C. HOW TO DELIVER SERVICES?

Three main models for delivering the services are discussed here. One is the *intensive and universal case management approach* to delivering services used in the PESD programs. All welfare recipients who found jobs and were targeted for services were assigned to a case manager (a job retention specialist) who maintained contact with them and provided a comprehensive set of services. These services included counseling, service referrals, help with problem solving, and mediating with staff from other agencies on benefit and other issues.

A second, less-intensive approach is to provide clients with access to a resource room that focuses primarily on reemployment services. These resource rooms are convenient locations where clients can look for job leads, use telephones to call employers, use computers or typewriters to update their resumes, and fill out job applications. Individuals may work independently in these resource rooms or seek the assistance of a staff person. The rationale for resource rooms as the primary job retention service is that many individuals already have demonstrated an ability to find jobs and may need only minimal assistance to find a new job or upgrade their jobs.

Such resource rooms could be open after standard hours for the benefit of both job finders and employed individuals who are seeking job upgrading or advancement. Resource rooms would be similar to the one-stop career centers currently supported by DOL and other employment agencies. Retention programs can work with DOL programs and other employment agencies to try to integrate resources and tie in to these existing centers. While some of these existing sites may have an experienced worker orientation and may not be suitable for current or former welfare recipients, other sites may more easily be integrated for this population and should be used by job retention programs so as to maximize the number of such available centers available to current and former TANF recipients. These resource rooms should be available to all those who seek to find better jobs or find other employment, regardless of their TANF reciprocity status.

A third, *more integrated approach*, could include both case management and resource room approaches, but select individuals for the more intensive services. Case management and other more intensive services can be provided to the clients who most need assistance, and the resource room facilities can be made available to all. Furthermore, resource rooms could include staff who have some links to the welfare agency and who may be able to deal with one-time emergencies and benefit resolution issues and other one-time emergencies that clients may face. In this section, we discuss the trade-offs among the three approaches:

Summary: How to Deliver the Services?

- Alternatives: Systematic case management or available resource room supports
- Preferred strategy: Integrate the two alternatives
 - Provide intensive case management for the most needy clients
 - Provide enhanced resource room facilities for all

Option 1: Case Management Approach

- + **By maintaining regular contact with all clients, case managers can build up trust and a good relationship with the client.** This will allow case managers to identify emerging problems and help clients act on them promptly. PESD case managers found that even clients who did not initially want any contact with the case managers often opened up over time, because they realized that these case managers were sincere and could provide valuable moral and other support.

- + **Case management allows tailoring of services and an individualized approach.** Case managers can maintain an appropriate level of involvement with clients and can make access to some services easier. This approach also allows the case managers to maintain flexibility and to not impose a uniform set of services on all.

- **Universal case management can be costly and hard to deliver on a large scale.** For case managers to be able to reach and maintain contact with all their clients, and for case management services to be effective, case managers will need small caseload sizes. This is not always possible, however. For example, by the end of the PESD enrollment period, case managers had been assigned, on average, between 100 and 170 clients each. An average of between 40 and 70 percent of clients across the sites were active during any given quarter and the case managers had some service contact with them. This can become costly if a large number of clients are to be served. In addition, it may be difficult to find enough case managers who can take a flexible approach to service delivery by providing individualized services and by remaining accessible to clients by working evenings or weekends.

HOW TO DELIVER SERVICES?

Hands On: Operational Suggestions for Case Management Approach

- Need highly experienced staff who have worked with welfare recipients, have retention experience, and can identify needs and provide appropriate services. Staff need to be empathetic, have good people skills, and be flexible with respect to work schedules and service delivery approach. Staff must build trust and overcome communication barriers.
- Case managers should be ready to provide a range of services. These services would include making it easier to obtain transitional benefits, dealing with other eligibility issues, coaching clients to have back-up plans for child care and transportation, helping clients develop a monthly budget, and helping with tax and EITC. Additional services would be job search assistance, referrals for legal assistance, referrals for drug abuse or psychological counseling, and mediating with landlords, credit companies, or employers.
- Program staff should form good links and network with service referral agencies, have access to a wide variety of resources, and have a good working relationship with other agency staff.
- Case managers can give clients resource books containing lists of child care centers, forms for budgeting, transportation route maps and schedules, lists of community tax centers, places to go for EITC assistance, information on free legal counseling, and lists of shelters for abused individuals.
- Programs should be aware that not all services they plan may be delivered. For instance, employer mediation will require clients' approval, which is likely to be difficult to obtain; some services (such as providing tax and EITC information) will need careful staff training or the use of specialists.
- It may be useful to do a formal or informal assessment soon after job start and periodic reevaluations to determine issues the client may face and the types of services needed.
- It may sometimes be difficult to engage clients who need services. Programs may be able to use program requirements and sanctions to get certain clients still on TANF to engage in workshops and other activities and use other persuasive techniques to engage those who have exited TANF.
- Case managers should set up a note-keeping system (to track clients' problems) and a tickler system (to note key dates to contact clients). A management information system (MIS) may be useful for monitoring contacts.

Option 2: Resource Rooms/One-Stop Career Centers

- + **Job search supports and resources, with a little additional support, may be sufficient for many welfare recipients who find jobs.** Not all clients need intensive assistance, and welfare recipients who are less needy or are capable of making it on their own with a little additional assistance may find that this smaller level of support is sufficient. For these individuals, ongoing case management might not be necessary, and the provision of such resource rooms will allow those who need assistance to help themselves.

- + **Will be less costly to provide this level of support on a large scale to welfare clients.** Programs will not have to spend a lot of resources, either monetary or human, on providing these services to all welfare recipients who have found jobs.

- + **Can ensure wide coverage.** By having resource rooms or similar facilities in a wide range of locations, programs can ensure that clients who need these services can easily access them. Such resource rooms can also remain open longer (such as during evenings and weekends) to facilitate job advancement among those already employed who are seeking better jobs.

- **Some clients may need more intensive services than resource rooms offer.** Others may not know how to use the services the resource rooms offer. Moreover, these resource rooms only deal with one or a small number of dimensions of the problems that are faced by welfare recipients who find jobs. Thus, job retention programs that provide only resource rooms might not be adequate for many individuals.

HOW TO DELIVER SERVICES?

Hands On: Operational Suggestions for Enhanced Resource Rooms

- Resource rooms should be housed in easy-to-reach locations, perhaps apart from the welfare office. To provide easy access to clients, they can be set up at different locations. These locations include public libraries or offices or shopping malls that may be open long hours.
- The resource rooms should also be accessible to individuals who are working and are no longer on TANF, but who want to find better jobs. Providing access to resource rooms for all low-income entry-level workers and job seekers can also minimize the amount of stigma related to receiving welfare.
- Job retention programs should link up with community resource centers and one-stop career centers set up by employment agencies to minimize additional costs and to best use available resources.
- Resource rooms should be kept open beyond standard hours (including during evenings and weekends) so working clients can easily access them if they want to upgrade their jobs. Resource rooms could be open to all working and nonworking poor, regardless of welfare status.
- Resource rooms can be staffed with one or two individuals from welfare agencies who can work with welfare recipients to deal with one-time benefit resolution or other transitional assistance issues. Clients who appear to need more sustained assistance can be referred and assigned to regular job retention case managers.
- Welfare recipients (and former welfare recipients) can be sent periodic reminders about the availability of resource rooms and other services through newsletters and other mass mailings.
- So more individuals receive exposure to resource rooms and the services available, periodic workshops on appropriate workplace behavior, dealing with coworkers and supervisors, or other topics related to the transition from welfare to work could be held in them.

Option 3: Integrated Approach: Case Management and Enhanced Resource Rooms

- + **Combines the best features of the two separate approaches and provides the most appropriate set of services for different individuals.** Not all clients need intensive case management-based services. By making some minimal level of job search support and other assistance available to all, and case management services available to those who most need them, this integrated approach may best meet clients' varied needs. Programs that want to ensure broad coverage can more easily provide these services to employed welfare recipients who have lost their jobs or want better ones. By staffing a resource room with one or two case managers from welfare agencies, the programs also can ensure that other one-time needs of clients can more easily be met. In addition, welfare agency staff in these resource rooms can refer clients they perceive as needing more intensive and ongoing services to other job retention staff who are providing case management services. Finally, by allowing people to help themselves to available resources, programs are fostering independence.

- + **More moderate costs.** This approach takes a middle-ground approach with respect to costs. It will be less costly than providing case management services to all employed welfare recipients.

- **Success depends on programs' ability to track people into different service paths.** Programs will have to determine which clients need services and who can benefit the most from different types of services. Programs can then assign clients to the more-intensive case management services track or to the resource room track. Issues discussed in the targeting discussion still hold; if people who need services are not identified for intensive services, they may fall through the cracks.

HOW MUCH TO PROMOTE SERVICES?

Participation Option 1: Mandatory

- + **Can achieve high participation rates.** Mandatory programs usually ensure higher participation rates than voluntary programs for similar groups of individuals. If welfare agencies or job retention programs can identify individuals who can benefit from job retention services and can also identify effective services, mandatory participation requirements will lead to high participation rates and programs' serving more people who need and can benefit from services.

- **May foster dependence.** In the current environment, where the goal is to help get welfare recipients off assistance, "requiring" some program participation, especially as individuals are making their transition to employment, might be counterproductive.

- **Difficult to ensure compliance of all.** Programs can only use mandatory participation requirements effectively if they have a tool, such as cash assistance sanctions, that can help ensure compliance. This suggests that, at best, programs can attempt mandatory participation only among those who find a job but continue to receive welfare benefits. Furthermore, monitoring and ensuring compliance with programs can also consume case management time and other resources, and can be costly.

Participation Option 2: Voluntary

- + **May be less costly.** If participation is voluntary, and only those clients who feel they need services participate in the programs, program staff will not have to spend resources tracking and monitoring participation.

- **May not serve everyone who needs services.** Many individuals who need and could benefit from program participation may not choose to participate. Then individuals may easily lose their jobs and end up back on welfare.

HOW MUCH TO PROMOTE SERVICES?

Outreach Option 1: Passive

- + **Less costly; easy to implement.** Mass mailings and other forms of passive outreach can be less costly and less time-consuming than face-to-face or telephone meetings with clients. Face-to-face meetings may be difficult, since not all clients may have the time or desire to meet program staff. Telephone meetings may be easier, but not all individuals will have telephones or be willing to talk over the phone.
- **May not serve everyone targeted.** Merely providing information on available services at an early point in time or sending periodic reminders may leave clients without a real sense of what the services being provided are and relatively unmotivated to use them.

Outreach Option 2: Active

- + **May enable programs to serve a larger fraction of those they want to serve.** Experience from PESD shows that even clients who did not initially want to be bothered by case managers realized their value and warmed up to them after a while. Active outreach may be easier to conduct if clients are still on welfare and the program can require their participation, or if the agency providing services has a good reputation for being a service-oriented agency.
- **Will be more costly and time-consuming.** PESD case managers spent a fair amount of time calling clients and setting up meetings with them to learn more about them, to explain available program services, and to maintain regular contact with them. Some working clients can only meet during the evenings or weekends, since they work during the day; this can also take additional resources.

E. WHEN TO PROVIDE SERVICES?

States or local agencies setting up job retention programs or services must consider two questions related to when to provide services:

- *How soon after job start should services be provided?*
- *For how long should services be provided?*

Summary: When to Provide Services?

- Job retention services do not necessarily have to be “postemployment” services. Many services can begin before job start, and others should be provided as early as possible after job start.
- Ensure availability of services for at least six months of steady employment for most and for longer periods for those who lose jobs

When to Start?

Programs should provide services to employed individuals as early as possible and integrate some job retention services into job preparation and job placement activities. Most individuals face the greatest challenges to job retention soon after job start, and their needs are most intensive at this time. Early preparation and integration of job retention strategies before job start may help employed TANF recipients be more prepared for the world of work. For instance, job clubs and job training workshops could include sessions on getting along with supervisors and coworkers, finding child care and transportation and making back-up arrangements, and budgeting. Finally, discussing these issues early on may in itself lead to better job placements or job matches and better chances of job retention.

TANF staff should inform welfare recipients of universally available job retention resources prior to job start (when clients are informed about time limits and other program rules and services). Those targeted for special services should be made aware as early as possible of what

WHEN TO PROVIDE SERVICES?

When to Start? (*continued*)

additional services will be available and any requirements to participate. Providing early information on job retention services can ensure that welfare recipients have full information on potentially available services prior to job start and can also minimize the amount of individual outreach needed after welfare recipients find jobs.

Not all clients will go through job placement programs or other TANF components, and it will be important to reach these clients soon after they find jobs. The PESD programs showed that, with some effort, it is feasible to establish quick contact. Even though the PESD programs were new, and individuals had no prior knowledge of the existence of job retention services, case managers managed to establish contact with sample members quickly. More than half the clients were contacted within three weeks of being referred to the demonstration, and more than 80 percent were contacted within six weeks. Such early contact was possible because staff outreach occurred soon after identification and referral of clients to the demonstration.

By establishing early contact, program staff can more readily determine clients' needs and identify best strategies to follow based on clients' strengths. For instance, it may be useful to conduct assessments on all recipients who find jobs to establish service goals for clients. However, program staff may not want to provide too much structure (especially for those assigned to case management) because clients may resent it if they are taking their first steps toward self-sufficiency. Finally, some clients will be hard to reach, and persistent effort may be needed to contact them. Program staff will have to determine if these hard to reach clients are high-risk clients who should be contacted or if they are likely to be able to manage on their own.

How Long to Serve?

While many problems occur at job start, clients continue to experience problems over time. It is important to *maintain* contact to promptly detect job-threatening problems that may occur over time.

How Long to Serve? (*continued*)

The first six months after job start is critical to determining individuals' ability to sustain employment. Studies show that exit rates from jobs are very high during the early months after job start (Rangarajan, Schochet, and Chu 1998). Job retention programs serving clients should try to ensure that those who need ongoing services are served for at least six months or until there is clear evidence that an individual has overcome major hurdles. Therefore, programs may want to follow an aggressive outreach strategy, at least for the first few months after job start.

WHEN TO PROVIDE SERVICES?

Hands On: Operational Suggestions for Establishing and Maintaining Contact in a Case Management Approach

- It is important to establish communications promptly and address problems early. Programs may want to have more intensive contact early, then ease up over time (unless the client loses the job).
- A simple identification and referral process can avoid delays in providing services to clients. For instance, excessive bureaucratic processes and employment verification may lead to delays in providing services.
- Outreach needed to establish contact can be minimized if individuals are made aware of services prior to job start (for example, when TANF recipients are being informed of other welfare rules and services). It will be important to plan a conscious outreach effort and do this early (especially if states are thinking of contracting out job retention services). Programs may want to publicize the availability of these services while clients are still on welfare.
- If a welfare agency is providing services, its reputation with welfare clients can affect its ability to reach out to such clients.
- Repeated contacts may be needed before trust can be established. Delivering job retention services effectively requires open communication, and it may take time before case managers can understand clients' circumstances.
- Personalized, flexible, and nonbureaucratic communication can help build trust and allow staff to more easily maintain contact with clients. For instance, staff can send birthday or seasonal greeting cards, newsletters, or other informational mailings.
- Program requirements and sanctions can play a useful role in the early use of services, especially in establishing initial contact between a client and case manager.

F. WHO WILL RUN THE PROGRAMS?

Job retention services for employed welfare recipients can be provided directly by welfare agencies or contracted out to other agencies/organizations. The PESD programs used a variation of the first approach: they set up their job retention units as an extension of their JOBS programs, but they attempted to maintain some separation from welfare by establishing job retention units as new programs. In this section, we discuss three ways of providing job retention services:

- *Directly, as part of welfare agency services (perhaps as part of job placement)*
- *Through welfare agency staff (or staff hired by welfare agency), but as a separate unit*
- *Contracted out to other local or community agencies*

Each approach has advantages and drawbacks. Ultimately, what an agency chooses will depend on the resources available and its ability to provide services. Furthermore, the ability of the welfare agency to engage clients may depend to some extent on the agency's reputation with clients. Increased work requirements in the past few years have given many welfare agencies a reputation for "pushing people into work." As part of the evolving changes, states will need to retrain income maintenance workers and other program staff to help welfare recipients find and keep jobs by identifying emerging needs and providing appropriate assistance. Providing postemployment services could be one way of telling welfare recipients that they are responsible for their move toward self-sufficiency by finding employment, but that states will provide additional services to help them attain their goals.

Summary: Who Will Run the Programs?

- **Options:** Can be run directly by welfare agency staff, by welfare agency staff with some separation from welfare, or contracted out
- **Optimal strategy:** Depends on agency's capabilities to provide services
Depends on how clients perceive the staff responsible for facilitating employment entry. If the agency has a reputation for being service-oriented and friendly, and has the flexibility to meet clients' needs, the advantage of contracting out services may be diminished.

WHO WILL RUN THE PROGRAMS?

Option 1: Provided Directly as Part of Welfare Agency Services

- + **Agency staff already know the clients and their histories, and this might lower one barrier to communication.** Having job placement or other agency staff provide services maintains some continuity. It also enables retention staff to use assessments and other material already collected as part of job placement efforts. In addition, this approach allows for easier integration of services provided before and after a job is found.

- + **If job retention programs are part of welfare agencies, program staff may more easily be able to use participation requirements and program mandates imposed by welfare.** The threat of sanctions may increase participation among those targeted clients still receiving TANF who do not want any job retention services.

- + **If job retention programs are part of welfare agencies, they may be able to more easily correct TANF benefits problems or deal with transitional benefits eligibility issues.** By being part of the welfare system, job retention staff can more easily work within the system to correct payment errors and to deal with problems related to accessing transitional benefits.

- **Many clients resent welfare agency staff and may not want to work with them.** PESD sample members often complained of the pressures welfare agency staff applied and said they wanted no contact with them. Ensuring that individuals, particularly those who have left welfare, will participate in job retention programs will be difficult.

WHO WILL RUN THE PROGRAMS?

Option 2: Part of Welfare, But with Some Separation

- + **Not directly part of “welfare” and the associated stigma attached to it.** PESD programs found that many newly employed welfare recipients did not want to have anything to do with welfare. For instance, to get individuals to use program services, one of the PESD programs changed its name and established a distinct identity with its own logo and stationery. After doing so, it found that more clients were willing to participate. PESD case managers also indicated that it was easier to gain clients’ trust, since the case managers were not also directly making benefit payments and controlling welfare checks.
- + **Easier access to agency data.** Retention case managers can more easily access case histories of clients and other information from welfare system data or other tracking data. They are also more likely to be able to correct benefit errors and deal with other transitional benefits issues since they are part of the system.
- + **Greater flexibility in service delivery is possible.** Because PESD was set up as a separate unit, these case managers could be more flexible in their approach to service delivery than under regular welfare and job placement programs. Furthermore, by having access to all the same job placement and other resources as welfare case managers, PESD case managers could deliver a wide range of services.

Option 3: Contracted Out Services

- + **Can have specialized employment agency and other staff provide services.** If welfare agencies lack staff or want non-welfare-related professional staff to provide these services, they can contract out for services. The agencies may then more easily be able to impose performance measures in terms of desirable outcomes, by tying financial payments to performance.

WHO WILL RUN THE PROGRAMS?

Option 3: Contracted Out Services (*continued*)

- + **Can avoid stigma.** Some welfare recipients, as they move toward independence from welfare, may want no contact with welfare agency staff. Furthermore, welfare recipients who find employment typically do not want their employers to learn of their past reliance on welfare; consequently, job retention staff from welfare agencies usually are not able to provide employer mediation. Clients might be more likely to allow individuals from employment agencies to mediate with their employers.

- **Requires clients to work with different staff.** Contracting agencies will have to establish new communications with clients. These agencies might not have access to assessments or other personal information collected by welfare agency staff, or they may be unable to effectively use such information.

- **May be difficult to get high participation rates.** Welfare recipients who have found jobs may be reluctant to seek assistance from contractors they do not know, and take-up rates may be low. This problem may lessen after the contracting agency gains a reputation among welfare recipients for serving employed individuals. Moreover, this problem may not exist if the contracted agency has a positive reputation within the community.

- **Tracking clients and providing certain services may be difficult.** Welfare agency staff can use the agency data-tracking systems to determine earnings changes. Furthermore, as more agencies are integrating data systems across different public assistance programs, the amount of information available to welfare agency staff can be large. Private contractors who do not have access to these systems might find it harder to track current or former welfare recipients who have found jobs. They may also find it more difficult to deal with benefit resolution and other issues, which are more familiar to welfare agency workers.

Option 3: Contracted Out Services (*continued*)

- **May be difficult to ensure accountability unless some performance-based measures are imposed.** Private contractors typically are paid a fixed dollar amount per client, and welfare agency staff usually have little control over what the contractors do to promote job retention. States may have to consider financial incentives to ensure accountability.

WHO WILL RUN THE PROGRAMS?

Hands On: Operational Suggestions for Separate Unit of Welfare Agency

- Provide information on availability of postemployment services while clients are searching for a job
- Establish clear set of responsibilities for retention program staff and for job placement staff as clients cycle in and out of welfare
- Establish good communications with income maintenance workers who can quickly act on resolution of benefits issues

Hands On: Operational Suggestions for Contracting Out Services

- Provide information on availability of services before clients find jobs
- Have designated welfare agency staff who can work with contractor agency staff to deal with welfare-related issues, using welfare tracking systems if necessary
- Set up clear procedures for how clients might get referred to services; conduct minimal levels of followup to ensure participation
- Provide financial incentives in contracts to ensure some accountability. Community Solutions, PA, establishes financial incentives for job placement and retention contractors by making a substantial portion of their reimbursement contingent on participants' success in sustaining their employment for 12 months
- Ensure open channels of communication between contracting agency and welfare agency staff
- If services are contracted out to several agencies, ensure clear method for referral of clients to particular agency (for example, based on need or location)

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TABLE A

SELECTED PROGRAMS CURRENTLY BEING IMPLEMENTED BY STATE/LOCAL AGENCIES^a

| Name | Address | Contact | Description |
|--|--|---|--|
| EARNINGS SUPPLEMENT | | | |
| New Hope Demonstration Program | New Hope Project, Inc. Milwaukee, WI | Julie Kerksick 414-342-3338 | Provides monthly earnings supplements for full-time workers that, combined with federal and state Earned Income Tax Credits, brings income near or above the poverty level. Also provides subsidized health insurance and subsidized child care. |
| Families First Program | Families First Program, Tennessee Department of Human Services, Nashville, TN | Bettie Teasley 615-313-5652 | The Families First Program of the TDHS includes training participation requirements that enable participants to qualify for existing HUD income exclusions. For Families First participants who reside in public housing or in Section 8 housing, incremental increases in income received as a result of participation in approved training programs are excluded from rent computations. The rent is instead based on the amount of income received prior to the start of job training. In addition, for those in public housing, employment-related income is excluded for an additional 18-month period. |
| CHILD CARE | | | |
| Child Care Support Network | Rhode Island Department of Human Services, Child Care Support Network, East Providence, RI | Elizabeth Suswal 401-438-9500, ext. 321 | Collaborative effort of several organizations to provide comprehensive support to members of the child care community who live in distressed areas. |
| Child Care Solutions | Child Care Support Center, Child Care Solutions, Atlanta, GA | Pam Runkel 404-479-4233 | Provides information, assistance, and training to caregivers and educates parents and community about the importance of expanding affordable, high-quality child care. Special attention is given to locating nonstandard-hours care, sick-child care, and special needs child care. |
| Lincoln Action Program | Lincoln Action Program, Job Opportunities for Low-Income Individuals (JOLI) Project, Lincoln, NE | Sue Hinrichs 402-471-4515 | Addresses the dual need for employment and child care among Temporary Assistance for Needy Families (TANF) recipients and other low-income individuals. The program's goal is to create 125 new child care or other microenterprise businesses and/or jobs. |
| School Age Child Care | Connecticut Department of Social Services, School-Age Child Care, Hartford, CT | Amparo Garcia 860-424-5346 | Provides child care training to current welfare recipients. Provides pre-service and in-service training, and participants are placed with a child care program or school-run program upon training completion. |
| Centerville Cluster Day Care Diversion Project | Iowa Division of Economic Assistance Community Self- Sufficiency Grant, Des Moines, IA | David Perret 515-281-4187 | Expands the number of facilities that provide care during nonstandard hours and assists TANF participants in securing nonstandard-hours care in rural areas. |

TABLE A (continued)

| Name | Address | Contact | Description |
|---|---|--|--|
| Cars Assist Recipients in New Grants (CARING) Program | Wythe County Department of Social Services, CARING Program, Wytheville, VA | A. Michael Hall 540-228-5493 | Helps the area's welfare recipients overcome transportation barriers to employment and self-sufficiency. The intent of the program is to provide qualified welfare participants with a vehicle through a lease purchase program. |
| Job Ride | State of Wisconsin Department of Workforce Development, Division of Economic Support, Madison, WI | Leonor Rosas DeLeon 608-267-9022 | The program addresses the transportation needs of the area's welfare applicants and participants by expanding transit services, creating employer initiatives, and improving coordination among existing public and private providers of employment transportation, social services, and specialized transportation. |
| Job Opportunity Transportation Program | Public Social Services Agency, Job Opportunity Transportation Program, Ventura, CA | Jim Becker 805-652-7835 | Provides California welfare program (CalWORKs) participants with reliable transportation to maintain employment, get off of welfare, and achieve long-term financial self-sufficiency through the provision of auto loans. The program purchases used vehicles and sells them at minimal cost to prescreened welfare families. |
| Wheels for Work | Anne Arundel County Department of Social Services, Anne Arundel County, MD | Vesta Kimble 410-269-4603 | Addresses the transportation needs of welfare recipients and applicants in the area by training welfare recipients to become van company owners and operators. |
| WorkPass Program | New Jersey Transit and New Jersey Department of Human Services, Trenton, NJ | Lou Capadona 973-491-7109 | Supplies Work First New Jersey participants with monthly New Jersey Transit passes so that they can access reliable transportation to their work-related services. Conducts research to determine the transit availability of different work sites and work activities and sets up resource centers at each county Work First agency, displaying transit timetables, maps, guides and informational brochures on special services. |
| Community Self-Sufficiency Grant | Iowa Department of Human Services, Des Moines, IA | David Perret 515-281-4187 | Establishes a database to serve as a transportation resource and referral system for TANF participants, and link participants with the proper transportation for obtaining and maintaining employment. |
| AdVANtage Van Service Entrepreneurs Project | Anne Arundel County Dept. of Social Services, Anne Arundel County, MD | Vesta Kimble 410-269-4603 | Trains welfare recipients to become van company owners, conducts business training, helps negotiate lease-purchase agreements and insurance policies. Subsidized transportation is provided to any clients enrolled in job search. |
| AFFORDABLE HOUSING | | | |
| Time Limited Rental Assistance Program | Time Limited Rental Assistance Program, Connecticut Department of Social Services, Hartford, CT | Kevin Loveland 860-424-5031 | Assists the area's TANF recipients with monthly rental payments. The program's goal is to provide a monthly rental assistance payment to landlords to make safe, affordable housing available for needy families. |

TABLE A (continued)

| Name | Address | Contact | Description |
|--|---|---|--|
| Work First New Jersey Housing Assistance Program | New Jersey Department of Community Affairs, Work First New Jersey Housing Assistance Program, Trenton, NJ | Roy Ziegler 609-633-6150 | Provides temporary rental subsidies to supplement the wages of certain entry-level workers. Establishes an escrow/savings account to support assisted tenants whose income does not increase. Provides home ownership opportunities. |
| Seattle Jobs Initiative--Housing Program | Department of Housing and Human Services, Seattle, WA | Sunny Coulson 206-628-6975 | Intended for low-income and TANF-recipient families and individuals who express a need for assistance by providing housing units, rental assistance, Section 8 vouchers, or credit/loans. Program also provides training to case managers on housing issues and housing advocacy. |
| Lease Purchase Program | Cleveland Housing Network (CHN), Cleveland, OH | Kate Monter Durban 216-574-7100 | Offers very low-income and welfare families the opportunity to eventually own their own home while salvaging single family houses that are badly in need of fundamental repair. The program is designed to keep monthly payments as low as possible. |
| PHYSICAL HEALTH/MENTAL HEALTH/SUBSTANCE ABUSE | | | |
| Educational Outreach Initiative | Southern Institute on Children and Families, Columbia, SC | Sarah Shuptrine, Gerry McKenzie 803-779-2607 | Initiative to increase health coverage for children and families. Also involved in removing bureaucratic and other barriers that restrict access to needed services. |
| Learning Disabilities Initiative | Kansas Department of Social and Rehabilitation Services, Topeka, KS | Phyllis Lewin 785-296-3349 | Provides training and assessment tools to welfare case management staff to help them identify service delivery strategies for clients with disabilities. |
| Wisconsin Works (W2) Disabilities Hotline, Disabilities Training, and Linkages with Vocational Rehabilitation Wisconsin Works (W2) | Wisconsin Department of Workforce Development, Madison, WI | Carolyn Hoffman 608-266-7826 Sue Larsen 608-266-3288 | Provides assistance to clients with disabilities, including those who have disabilities and are not receiving Supplemental Security Income (SSI). Also offers advanced training to case managers for identifying, working with, and making appropriate referrals for clients with disabilities, including learning, physical, and cognitive disabilities. |
| Nevada County Greater Avenues for Independence (GAIN) Employment Services Program | Nevada County Public Social Services, Nevada County, CA | Suzanne Nobles 916-265-7171 Terri Fransen 916-265-1760 | Provides intensive and specialized case management to clients exempt from program requirements because of mental illness, mental health problems, family crises, or legal difficulties. Services include assessment of mental health and other problems, crisis counseling, support in dealing with stressful situations, regular home visits, and referrals to specialized community resources. |
| Supported Employment Program | New Jersey Division of Mental Health Services, Trenton, NJ | Steve Fishbein 609-777-0708 | Provides individualized job placement and supported employment services to people with severe and persistent diagnosed mental illnesses. It offers mental health counseling, vocational and skill assessments, development of client work profiles, identification of necessary job supports and accommodations, interpersonal and life skills training, job preparation, job coaching, work experience internships, and individualized job placement. |

TABLE A (continued)

| Name | Address | Contact | Description |
|--|--|--|--|
| Job Training and Rehabilitation Services Project | Ohio Department of Mental Health, Columbus, OH | Roy Pierson 614-466-7347 | Offers a full range of mental health services, along with extensive job training and vocational rehabilitation services through contracts with local mental health centers and collaborative arrangements with the Department of Rehabilitation Services and other local service providers. |
| Oregon JOBS Program | Oregon Adult and Family Services, Salem, OR | April Lackey 503-945-6197 Christa Sprinkle 503-256-0432 | Identifies mental health problems among welfare participants through ongoing interactions with clients, home visits, and observations of clients during Life Skills sessions and other JOBS-related classes. Case managers are supported by mental health professionals, some of whom are also located in the welfare offices. |
| Family Employment Program (Single Parent Employment Demonstration) | Utah Department of Workforce Services and Human Services, Salt Lake City, UT | Helen Thatcher 801-468-0177 | Finalizing the development of a standardized screening tool to identify, at the initial intake interview, clients with mental health and substance abuse needs. Participants with identifiable barriers to employment are referred to a case-staffing team, which includes staff who have expertise and experience in different service areas and who work together to assess participant needs and determine the best service strategies. |
| Substance Abuse Research Demonstration Project | New Jersey Department of Human Services, Trenton, NJ | Annette Riordan 609-292-9686 | Strategies include specially trained case managers, collaboration between client and case manager in development of a treatment plan; creative, low-cost incentives (gift certificates for clothing, home accessories, hair cuts, cosmetics) to provide additional motivation and increase self-esteem; and low-intensity support services to assist clients in the transition from treatment to community life. |

PERSONAL SUPPORT SYSTEMS

| | | | |
|---|--|---------------------------------|---|
| Options/Opciones Program | Taylor Institute and the Illinois Dept. of Human Services, Chicago, IL | Rebekah Levin 773-533-2180 | Provides training on domestic violence issues to IDHS case management staff. The training includes the use of a domestic violence screening tool. Under full implementation, the program intends to offer the following additional services to clients: (1) case management services, including helping clients access emergency shelter, physical or mental health services, legal services, domestic violence treatment, literacy training, and job readiness and placement services; (2) a preemployment 10-week training program; and (3) weekly peer support groups. |
| Domestic Abuse Intervention Project | Coordinated Community Response to Domestic Violence, Duluth, MN | Coral McDonnell 218-722-2781 | Provides temporary shelter to domestic violence victims and their families. Other services include safety planning, peer support groups, court advocacy services, and supervision of visits between assailants and children. |
| Domestic Violence Awareness Training and Service Planning | Anne Arundel Department of Social Services, Anne Arundel County, MD | Vesta Kimble 410-269-4603 | Trains eligibility workers and case managers to identify victims of domestic abuse and to address the subject of domestic violence with clients. Developed a domestic violence training curriculum for administrative and frontline social services staff, as well as for community providers of domestic violence services. |

TABLE A (continued)

| Name | Address | Contact | Description |
|------------------------|---|---|---|
| Model Office Project | Colorado Office of Child Support, Denver, CO | Jessica Pearson Esther Griswold 303-837-1555 | Examined intake process relating to domestic violence and the use of good-cause exemptions from child support regulations. Standardized training plan and screening and assessment for intake workers were developed. |
| Domestic Violence Plan | Oregon Department of Human Resources Salem, OR | Shirley Iverson 503-945-6902 Carol Krager 503-945-5931 | Includes comprehensive staff training and domestic violence services for needy clients. Each district office appoints a domestic violence contact person to coordinate training and services. All welfare agency staff receive training (both initial and ongoing) on how to identify and refer victims of domestic violence. The training model includes the use of a screening and assessment tool to identify victims. |

^aMost of these programs are more comprehensive than the brief description allowed (Johnson and Meckstroth 1998).

About the Author

Anu Rangarajan is a senior economist at Mathematica Policy Research specializing in welfare, education, and nutrition policy studies. In addition to directing the PESD evaluation, she is conducting a study using national data to examine the longer-term employment experiences of welfare recipients who find jobs. This study also identifies individual characteristics to help policymakers and program operators efficiently target job retention services. Dr. Rangarajan has also studied issues related to teenage parents, the transition to work of single parents on welfare, and food stamps.

For more information about this study or Mathematica's other welfare research, please contact Anu Rangarajan, senior economist, (609) 936-2765, arangarajan@mathematica-mpr.com. Information is also available on our web site at www.mathematica-mpr.com.

Other Related Reports

“Providing Services to Promote Job Retention.” Joshua Haimson, Alan Hershey, and Anu Rangarajan. Princeton, NJ: Mathematica Policy Research, Inc., October 1995. (PR95-32, \$10.00)

This report looks at how the PESD programs were implemented in Chicago, San Antonio, Portland, and Riverside, California.

“Taking the First Steps: Helping Welfare Recipients Who Get Jobs Keep Them.” Anu Rangarajan. Princeton, NJ: Mathematica Policy Research, Inc., November 1996. (PR96-40, \$2.50. Also available in PDF format on our Web site at www.mathematica-mpr.com.)

The barriers welfare recipients face in the transition from the welfare rolls to the payrolls of the private sector are the focus of this report. The report also takes an in-depth look at the services that job retention programs can provide to ease the transition, as well as broader policy changes that can be considered at the state and local levels.

“Getting Help to Stay Employed: The Use of Postemployment Services.” Joshua Haimson and Alan Hershey. Princeton, NJ: Mathematica Policy Research, Inc., April 1997. (PR97-20, \$2.50)

What services do welfare recipients who are moving into the workplace use? This publication examines the types of services used by PESD clients as well as the extent of use.

Other Related Reports (continued)

“The Effectiveness of the Postemployment Services Demonstration: Preliminary Findings.” Anu Rangarajan, Alicia Meckstroth, and Tim Novak. Princeton, NJ: Mathematica Policy Research, Inc., January 1998. (PR98-03, \$6.00. Also available in PDF format on our Web site at www.mathematica-mpr.com.)

Using an early sample, this report discusses preliminary findings on the effectiveness of the PESD concept to promote job retention.

The final report on the effectiveness of the PESD program will be available in fall 1998.

Ordering Information

To order PESD publications, please contact Jan Watterworth, Librarian, Mathematica Policy Research, Inc., PO Box 2393, Princeton, NJ 08543-2393, (609) 275-2334. Please specify the publication number listed in parentheses above and add \$2.50 per order for postage and handling.

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