



# Career Advancement and Work Support Services on the Job

IMPLEMENTING THE FORT WORTH  
WORK ADVANCEMENT AND  
SUPPORT CENTER PROGRAM

Caroline Schultz  
David Seith

APRIL 2011

THE WORK ADVANCEMENT AND SUPPORT CENTER DEMONSTRATION



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## Overview

The Work Advancement and Support Center (WASC) program in Fort Worth was part of a demonstration that is testing innovative strategies to help increase the income of low-wage workers, who make up a large segment of the U.S. workforce. The program offered services to help workers stabilize their employment, improve their skills, and increase their earnings; it also helped them apply for a range of financial work supports for which they might be eligible, such as child care subsidies, food stamps, and the Earned Income Tax Credit. WASC's designers intended that work supports would increase workers' income in the short term and that labor market advancement would increase their earnings over time. WASC targeted a group — employed, low-wage workers — that had not typically been served by the federal workforce development system. Fort Worth WASC services were delivered within employers' workplaces, rather than in a public agency setting as in the other WASC sites (Bridgeport, Connecticut; Dayton, Ohio; and San Diego, California).

MDRC developed the WASC demonstration and is responsible for its evaluation. Other sites are providing experimental evidence on whether WASC affects workers' employment and incomes. A similar analysis will not be conducted for Fort Worth, however, because the program was not able to recruit enough participants within the time frame needed by the demonstration.

## Key Findings

- **Strengths of the program.** Fort Worth was able to deliver WASC services in a workplace setting. Program staff became familiar with each employer's policies and advancement paths, and they incorporated this information into individual job coaching sessions with employees. Employer endorsement of the program may have lent it legitimacy among employees. Group training in English and computer skills was customized to each workplace, and completion rates were high. After WASC ended in Fort Worth, some employers showed an apparent increase in their capacity to train entry-level workers.
- **Limitations of the program.** The number of advancement opportunities available within a company were usually far fewer than the number of employees seeking to move up. The scope of the WASC training was limited, and employers had concerns about their ability to promote trainees or the possibility that trainees might seek better-paying jobs elsewhere. The workplace setting did not always allow enough time and privacy for individual coaching and assistance with work supports. Most workers were ineligible for key supports, such as food stamps and subsidized health insurance, because their family income was too high.

Fort Worth's program provides valuable insights into the unique challenges of operating income support and career advancement programs in small employer settings. Strategies that address these challenges, together with rigorous investigation of the effects of similar employer-based services and their associated costs, would clarify whether the components of the Fort Worth WASC program warrant large-scale adoption.



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## Preface

A large number of workers in the United States earn wages that are not enough to move their families out of poverty. Although policymakers are focusing more on helping low-wage workers get better jobs and receive available benefits, no public system targets this group. The One-Stop Career Centers around the country, funded by the Workforce Investment Act (WIA) of 1998, have focused primarily on providing employment services to job-seekers and helping employers fill entry-level vacancies.

This report examines a program that combined two types of income-building services for low-wage workers — skills training and connection to work supports — and delivered them in workplaces. Operated in Fort Worth, Texas, from 2006 until early 2009, the program was one of four sites in MDRC’s Work Advancement and Support Center (WASC) demonstration. WASC offered services to help workers stabilize their employment, improve their skills through education and training, connect to higher-paying jobs, and get access to food stamps, child care subsidies, and health insurance. Like the other three WASC sites, Fort Worth sought to expand the One-Stop’s activities to serve people who are employed, but at low wages. Unlike the other sites, Fort Worth delivered all WASC services in collaboration with employers.

The experience in Fort Worth suggests that there were advantages to delivering services in the workplace — chiefly, being able to reach people at a convenient time and location, often during paid work hours. Nevertheless, as similar initiatives have found, many lower-wage employees were not eligible for or interested in the work supports, suggesting that outreach via employers is an inefficient way to connect people to public benefits.

The skill-development components of the program may offer more promise, but they failed to overcome challenges inherent in its model. First, advancement in a company can require increases in skills or on-the-job experience that may be more than short-term, general skills training can offer. Second, while WASC aimed to achieve outcomes that are important to employers — such as reduced absenteeism and better performance and retention — there is limited evidence that these will translate into long-term earnings boosts for workers or increased productivity or profit for companies. Also, in companies that participated in the Fort Worth program (as in most workplaces), the number of entry-level workers far exceeded the opportunities for internal advancement. This suggests that coordinated, multiemployer initiatives may offer more flexibility than Fort Worth’s model. If employer-based services are envisioned as part of future iterations of the Workforce Investment Act or other public investments in worker education and training, these basic design issues will need to be addressed more explicitly.

Gordon L. Berlin  
President



## Acknowledgments

The Work Advancement and Support Center (WASC) demonstration in Fort Worth took the form of a workplace-based, advancement-focused program called “Project Earn.” It would not have been possible without the hard work and commitment of the administrators and staff at Workforce Solutions for Tarrant County. Special thanks also go to Jo Aleshire, Jill Navarrete, Sal Adamski, Debby Kratky, and Judy McDonald; their leadership made Project Earn a reality. Some of them also reviewed earlier drafts of this report. We thank as well the career coaches, business services staff, and other key staff of Project Earn — including Susan Anewishki, Amber Gosser, Frank Kuykendall, Pamela Jackson, Maricela Jimenez, and John Torres — who skillfully recruited employers, implemented the WASC program, allowed us to observe them at work, answered our questions, and provided a wealth of information about how the program played out at the front lines. Thanks also go to Jodie Sue Kelly, a consultant to MDRC, who developed training materials for the WASC demonstration and conducted training of Project Earn staff.

Employers and community college staff were essential to the successful implementation of Project Earn. In addition, several employers graciously provided MDRC with access to Project Earn participants for focus group interviews and other data collection activities. We extend special thanks to Nancy Ross, Carlos Morales, Gracie Vega, La Tanya Lynch, Mary Ellen Miska, and Kay Lee for their invaluable insights about the operation of the program.

MDRC’s capacity to carry out a demonstration with an ambitious learning agenda depends heavily on the ongoing commitment of key funding partners. They are acknowledged at the front of the report.

At MDRC, Frieda Molina, James Riccio, Cynthia Miller, and John Wallace provided important input and guidance on the analysis and early drafts. The report also benefited from reviews by Betsy Tessler and Alice Tufel. Alexandra Pennington programmed the baseline data and conducted its analysis, supervised by Mark van Dok. Nancy Rosas and Senait Tesfai contributed to qualitative research, and Daniel Schlaff assisted with report production. Robert Weber edited the report, and David Sobel prepared it for publication.

Finally, we extend our deep appreciation to the people who participated in the study and gave generously of their time to complete intake surveys and participate in focus groups.

The Authors



## Executive Summary

This report describes the design and operation of a workplace-based, advancement-focused program, called “Project Earn,” that was implemented from 2006 through mid-2009 in Greater Fort Worth, Texas. The program sought to increase the income of low-wage workers through a combination of earnings gains and financial work supports (including publicly funded benefits and tax credits) and was operated as one of four sites in the national Work Advancement and Support Center (WASC) demonstration.<sup>1</sup>

In 2007, one in four workers in the United States earned less than \$10 per hour — a wage rate that left many of these workers and their families poor or near poor.<sup>2</sup> The WASC program model was designed to increase the incomes of employed, low-wage workers, using a combination of two strategies within a single, integrated program:

- Providing services intended to help workers advance in the labor market, such as skills training and individual career coaching
- Enrolling workers in income supplement programs and other benefits for which they were eligible, such as the Earned Income Tax Credit, Child Tax Credit, food stamps (later called the “Supplemental Nutrition Assistance Program,” or SNAP), publicly subsidized health insurance, and child care subsidies

WASC brought together services that typically are offered via two separate types of organizations: workforce development agencies, which provide job training and placement, chiefly to unemployed workers; and welfare agencies, which provide many of the benefits targeted by WASC. In addition to providing training and other job advancement services, Fort Worth aimed to connect its participants to publicly funded benefits, or *work supports*. Unlike the programs in other WASC demonstration sites, the Fort Worth program was operated entirely by staff from the workforce development system — that is, without incorporating staff from the welfare system.

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<sup>1</sup>For a discussion of the WASC demonstration’s rationale and its implementation in sites other than Fort Worth, see Cynthia Miller, Betsy L. Tessler, and Mark van Dok, *Strategies to Help Low-Wage Workers Advance: Implementation and Early Impacts of the Work Advancement and Support Center (WASC) Demonstration* (New York: MDRC, 2009).

<sup>2</sup>U.S. Department of Labor, Bureau of Labor Statistics, “May 2007 National Occupational Employment and Wage Estimates, United States” (Washington, DC: U.S. Department of Labor, 2008). Web site: [www.bls.gov/oes/current/oes\\_nat.htm](http://www.bls.gov/oes/current/oes_nat.htm).



WASC sought to demonstrate that a package of services and supports could be directed at workers who were *already employed* — rather than unemployed — when they first enrolled in the program. In addition to providing evidence about the program’s potential effects on low-wage workers, the demonstration sought to learn whether WASC services could help meet goals that are important to many employers: stabilizing and strengthening the performance of entry-level workers and developing their skills to the point where they would be qualified to fill midlevel positions.

## **The Fort Worth WASC Model**

In Fort Worth, WASC recruited low-wage workers solely through employers, and it delivered services primarily within the workplace.<sup>3</sup> There were several reasons to attempt this approach. First, recruiting WASC participants through the workplace could mean gaining access to certain low-wage workers who might not otherwise be reached via WASC marketing efforts within the wider community — in particular, workers who had not already established connections to publicly funded work supports or employment services. Second, developing the services in collaboration with each WASC employer could mean increasing the relevance of career coaching to WASC participants’ current jobs and workplaces — which, in turn, might yield better results for both the employer and the employees. WASC sought out employers that had second-tier job openings that could be filled by their own entry-level workers, if given the right skills training. Third, it was hoped that employers would endorse WASC in order to establish its credibility among employees — thereby motivating employees to take part in WASC activities. Perhaps most important, offering services at the workplace — preferably on company-paid time — was a way to make WASC more convenient for workers. Participants would not need to make an extra trip to a One-Stop Center to receive WASC services.

MDRC developed and managed the WASC demonstration and is responsible for its evaluation.<sup>4</sup> An experimental study was designed to determine whether providing WASC services led to changes in earnings, income, and other outcomes for participants and their families. Ultimately, however, due to challenges encountered in recruiting enough participants for an employer-based study, the Fort Worth program was not included in the WASC impact analysis. Nevertheless, its implementation provides insights about the delivery of work supports and advancement-focused services in the workplace and about the capacity of public workforce development agencies to provide such services.

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<sup>3</sup>Four sites were identified to test WASC. In the other three — Bridgeport, Connecticut; Dayton, Ohio; and San Diego, California — WASC program offices were housed within the One-Stop Career Center system created by the Workforce Investment Act (WIA) of 1998. This was considered to be the primary WASC model, and these three sites are included in the evaluation of the impact of WASC services.

<sup>4</sup>Current and past funders of the WASC demonstration are listed at the front of this report.

The Fort Worth WASC program consisted of three components:

- **Skills training.** WASC group training was provided on-site at employers' locations, usually with paid release time — although not always during employees' regular shifts. In each workplace, the training was intended to address a set of employee skill gaps that were identified by the employer. Most of the classes consisted of basic skills training in computer applications and/or English language instruction, tailored to day-to-day work tasks and communications that employees would encounter on the job. Fort Worth contracted with community colleges to help develop the curricula and deliver the instruction. In order to maximize the number of participants served using the WASC project funding, training in most workplaces was delivered on a one-time basis (usually for a period of four to eight weeks), not as a continuing program.
- **Job and career coaching.** Individual coaching was a core element of the WASC demonstration, and Fort Worth provided on-site coaching to employees at each workplace. Participating employees were asked to identify specific goals for their job, career, and income and to meet individually with a coach before, during, and after taking part in group skills training. Coaches also connected participants with additional opportunities for education, training, and supportive services, and they encouraged participants to contact their coaches if they needed help resolving work-life conflicts or difficulties on the job. Job advancement coaching was constrained to focus on advancement openings found at the current employer. Employees were encouraged to move up at their existing employer by building tenure, increasing skills and certifications for more advanced positions or assignments, making advantageous transfers to other departments, or increasing their work hours.
- **Income supports delivered via employers.** In helping to bring work supports to employee participants, WASC had two objectives: (1) to make work pay by supplementing earned income, bringing total income to a level that could sustain a basic family budget, with the idea that participants would eventually increase their earnings to the point that the supports were no longer needed; and (2) to facilitate participation in education and training, by offering to cover employees' training-related costs, such as alternative transportation or child care (for employees who attended training outside their regular work shifts). For several key WASC-targeted benefits, including food stamps and subsidized health insurance, Fort Worth staff did not directly issue the supports; instead, they made participants aware of supports for which

they might be eligible and helped them to navigate the application processes required by the public agencies that administered these benefits.

In combination, and directed to a population of low-wage workers, these three components made up an approach that was different from existing services for employed workers, as had been previously provided by the Fort Worth workforce investment board.

The Fort Worth WASC program was managed by the local workforce development agency, which administered publicly funded job-seeker and other employment services, along with child care subsidies. Fort Worth paid for its WASC services primarily by using a combination of discretionary WIA dollars and direct site payments from MDRC. There were two teams of WASC staff in Fort Worth. First, the responsibility for engaging employers was assigned to Business Services representatives and managers, who marketed the project to local companies, identified potential employer partners, and extended the initial invitation to participate. Once employers agreed to participate, they were assigned to a second group of project staff, who had responsibility for designing and delivering a specific set of WASC services for each workplace setting. In turn, this team identified instructors from local community colleges to provide group training for participants.

Between early 2006 and mid-2008, Fort Worth was able to engage seven employers and to enroll more than 200 of their employees — most earning \$11 per hour or less — in the project. Employer recruitment began in 2005, and an initial pilot round of skills training classes was held at two employers in mid-2006. The full package of WASC services — including training, career coaching, and work support screening — was delivered at five additional employers, beginning in late 2006. Once enrolled, most WASC participants received four to eight weeks of skills training and one year of individual coaching and work support screening. The final round of WASC skills training classes was held in summer 2008, and follow-up meetings between participants and WASC coaches continued through early 2009. A final participant-coach meeting typically included review of the participant's job and career plans but no formal transition plan.

## **Key Findings on Program Implementation**

WASC's employer-based approach had clear strengths:

- **By using flexible streams of funding, Fort Worth was able to target a working population and customize services that incorporated WASC's core strategies and were generally compatible with workplace settings.**
- **Employees noticed that their employers had invested time and other resources in making WASC services available; employer endorsement of**

**the program may have lent it legitimacy in employees' eyes.** Moreover, by spending considerable time with employees, supervisors, and managers, WASC coaches became familiar with workplace-specific advancement paths, company policies, and human resource policies — and were able to incorporate this information into coaching sessions with participants.

- **In some sites, employers showed increased capacity and commitment to the training of entry-level workers, even after WASC services ended.** Standard basic skills curricula were customized to particular workplaces, although not perhaps to the greatest degree that might have been possible with a larger investment of time and resources.

WASC's employer-based approach also had important limitations:

- **The Fort Worth staff sometimes found it difficult to balance service obligations to both employees and employers — to treat both as clients — when their respective interests diverged.** Importantly, the number of advancement opportunities available within a company were usually far fewer than the number of employees seeking to move up. Employers were understandably reluctant to generate widespread expectations for advancement, and, as a result, some declined to participate in the project.
- **The training was limited, and employers had concerns about their ability to promote trainees or the possibility that trainees might seek employment elsewhere.** This related problem had serious implications for the career advancement prospects of participants. The training did not lead to portable skill certifications or other industry-recognized credentials for the employees who completed the classes. Employers sometimes were reluctant to allow outside (community college) instructors to learn too many proprietary details about the employer's work processes.
- **Although offering services in the workplace meant that employees did not (usually) have to travel to off-site locations to meet with WASC staff, the workplace setting did not always allow sufficient time and privacy to accommodate individual coaching and work support assistance.** Some employees simply found it difficult to step away from their duties during paid work hours or were reluctant to use their limited break times to meet with a coach. In some workplaces, barely more than half of Fort Worth participants met at least monthly with a coach.

- **Most of the low-wage workers recruited by Fort Worth turned out to be ineligible for key work supports, such as food stamps and subsidized health insurance.** This is a fundamental problem in conducting work support outreach through employers: employers do not know the total family incomes of their workers, and many low-wage workers live in households that are not low-income.
- **To develop and implement services in each new employer site in Fort Worth required considerable effort and was costly.** It is unclear whether Fort Worth's WASC model could be replicated at a larger scale.

## Conclusion

The experience of implementing the employer-based version of WASC in Fort Worth raises valuable questions about how best to design a model for delivering these services to employers and low-wage employees in their workplaces and about whether public workforce development systems are positioned to do so. Several key issues would need to be addressed in order for a similar model to be offered on a larger scale.

Fort Worth's program was unable to resolve a fundamental difficulty of implementing advancement-focused services in the workplace. Many employers simply do not have a large number of promotional, second-tier, or career-building opportunities for entry-level workers, although incremental wage increases are available. In such settings, training and coaching that focuses on individual worker advancement may not be justified, unless employers explicitly agree to — and have strong business reasons to — function as a temporary station for workers who are headed for more advanced positions in other firms or industries. For these firms, a retention focus — rather than an advancement focus — may make more sense.

The training offered in Fort Worth was the most attractive component of the program, both for employers and for employees. However, while many employees were satisfied with the basic skills training that WASC provided, others requested training in more technical skills leading to work-relevant certifications. Along these lines, future advancement programs could focus on training that explicitly leads, at least incrementally, to an employer- or industry-recognized credential. However, either for personnel management reasons or for competitive reasons, employers may be reluctant to train large numbers of entry-level employees in technical skills that would be required for higher-level positions — particularly if the skills involve proprietary work processes. For many employers, skill needs would be met if they hand-selected candidates to receive more advanced vocational skills training, while still offering to

other entry-level workers basic skills training — aimed at enhanced performance of current duties.<sup>5</sup> Skill development training could target a small set of advancement openings by using an existing model — on-the-job training — to subsidize wages for advancement trainees. The scale of this approach would be limited by the number of short-term advancement openings that the employer could offer. Alternatively, an advancement project could explicitly include negotiating with employers to pool job opportunities across firms and backfill entry-level positions, as is done in some existing sector-based initiatives. While employers in high-growth industries might have a natural incentive to implement something like WASC, other employers might require tax credits or other incentives to participate in any initiative that might mean advancing workers up and out of their companies. Such incentives could help offset the cost of paid release time and compensate for the cost of replacing employees who leverage their newly acquired skills to find better-paying jobs in other firms.

The logistical challenges that the Fort Worth team encountered suggest that individual career coaching as designed in WASC may not be cost-effective to deliver to employees in a workplace setting. To explore whether the extra effort and expense are worthwhile, rigorous research is needed to understand the value of individual coaching, either by itself or when coupled with skills training. Similarly, work supports outreach via employers may also be too inefficient. Future efforts would need to focus on supports with simpler or higher-income eligibility cutoffs or would need to find better ways to target a pool of workers who are likely to be eligible. Also, for those who do appear to be eligible for work supports, simplifying enrollment processes — and directly involving the agencies that administer those supports — could make signing up more attractive to low-wage workers.

The local workforce board that implemented WASC reported that taking part in the project meant expanding its capacity to design and deliver skills training to entry-level workers within their workplaces. Participation also meant that the board had to increase its expertise in the area of services provided to individuals after they have found jobs. Much of this was made possible because the site used flexible, discretionary WIA dollars to fund WASC. For several reasons, operating WASC-like services on a wider scale would be difficult under existing WIA formula funding, which designates no earmarked funding stream for *employed worker services*. Changes to the next iteration of the Workforce Investment Act could address at least some of these issues, as could continued innovation through competitive federal initiatives and, eventually, a dedicated stream of funding for low-wage, incumbent-worker programs and/or federal matching of state-sponsored initiatives.

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<sup>5</sup>Several employers noted that the random assignment design of WASC enrollment gave them little control over who would participate in the program. This problem would not be encountered under nonresearch conditions.

Overall, the experience of implementing the Fort Worth program points to unanswered questions about WASC's employer based-model: Is there sufficient demand for these services, *for entry-level workers*, on the part of employers? And, if so, would there be sufficient benefits — both to employers and to low-wage workers — for offering such services widely? This descriptive study did not explore the effects of WASC employer-based services on outcomes that employers value (such as productivity and workforce turnover rates) or its effects on participants' earnings, receipt of work supports, or subsequent employment patterns after their participation in the project. Although some participants were able to move into higher-paying jobs at their initial employers or at other employers, it is not clear whether WASC services were the primary cause of these advancements — or whether participants would have advanced, on average, in equal numbers in the absence of WASC services.

The other WASC demonstration sites, based in One-Stop Career Centers, are providing experimental evidence on whether these types of services have measurable impacts on workers' earnings and total incomes — but not in a workplace setting. Likewise, data from other employer-based programs can provide some indication of the outcomes associated with certain service components that were present in Fort Worth's program, but they do not encompass WASC's full package of coaching, training, and work support assistance. Given the considerable policy interest paid to employer services and employer-based interventions, further investigation into the effects of employer-based services, and their associated costs, would help clarify which are truly worth replicating on a larger scale.

## Introduction

This report describes a workplace-based, advancement-focused program, called “Project Earn,” that was implemented from 2006 through mid-2009 in Greater Fort Worth, Texas. The program sought to increase the income of low-wage workers through a combination of earnings gains and financial work supports (including publicly funded benefits and tax credits) and was operated as one of four sites in the national Work Advancement and Support Center (WASC) demonstration. This report details the design and operation of the Fort Worth WASC program. Because a full evaluation of the program was not completed as originally planned, this report does not attempt to quantify outcomes for participating Fort Worth employers and employees.

In 2007, one in four workers in the United States earned less than \$10 per hour — a wage rate that left many of these workers and their families poor or near poor.<sup>1</sup> The WASC program model was designed to increase the incomes of employed, low-wage workers, using a combination of two strategies within a single, integrated program:

- Providing services intended to help workers advance in the labor market, such as skills training and individual career coaching
- Enrolling workers in income supplement programs and other benefits for which they were eligible, such as the Earned Income Tax Credit, Child Tax Credit, food stamps (later called “SNAP”), publicly subsidized health insurance, and child care subsidies.

WASC brought together services that typically are offered via two separate types of organizations: workforce development agencies, which provide job training and placement, chiefly to unemployed workers; and welfare agencies, which provide many of the benefits targeted by WASC as well as cash transfer programs like Temporary Assistance for Needy Families (TANF). Although workforce and welfare agencies have sometimes coordinated their services to reach particular populations, such as TANF participants, typically they do not jointly serve a general population of low-wage workers, as was the case in WASC. Further, WASC sought to demonstrate that a package of services and supports could be directed at workers who were *already employed* — rather than unemployed — when they first enrolled in the program.<sup>2</sup>

MDRC developed and managed the WASC demonstration and is responsible for its evaluation. An experimental study was designed to determine whether providing WASC

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<sup>1</sup>U.S. Department of Labor, Bureau of Labor Statistics (2008).

<sup>2</sup>For a detailed discussion of the WASC demonstration’s rationale and its implementation in WASC sites other than Fort Worth, see Miller, Tessler, and van Dok (2009).



services led to changes in earnings, income, and other outcomes for participants and their families. The design called for half the individuals who were recruited for WASC to be randomly assigned to the program group and receive WASC services and half the individuals to be assigned to a control group that would not receive WASC services but would be eligible to seek other services generally available in the community. Over time, any observed differences between the two groups could be attributed to the effects (impact) of participating in WASC.

Four sites were identified to test the impact of WASC. In three sites — Bridgeport, Connecticut; Dayton, Ohio; and San Diego, California — WASC program offices were housed within the One-Stop Career Center system created by the Workforce Investment Act (WIA) of 1998 to provide employment services to job-seekers. In these three sites, WASC services were delivered by integrated teams of staff from both the workforce development system and the welfare system. This was considered to be the primary WASC model, and these three sites were included in the evaluation of the impact of WASC services.

The fourth site, Fort Worth, recruited low-wage workers solely through employers, and it delivered WASC services primarily within the workplace rather than in the One-Stop Centers. It was hoped that WASC services would lead to outcomes that are important to both workers and employers, such as improvements in employees' job skills, attendance, performance, and retention. Like the other three WASC sites, Fort Worth also aimed to connect its participants to publicly funded benefits — *work supports* — in addition to training and other job advancement services. However, the Fort Worth WASC program was operated entirely by staff from the workforce development system — that is, without incorporating staff from the welfare system. Ultimately, however, due to challenges encountered in recruiting enough participants for an employer-based study, the Fort Worth program was not included in the WASC impact analysis. Nevertheless, its implementation provides insights about the delivery of work supports and advancement-focused services in the workplace and about the capacity of public workforce development agencies to provide such services.

During the decade following passage of WIA in 1998, a series of proposals for reauthorization of WIA have addressed the need for more explicit federal guidelines, and directed funding, for training of employers' current (“incumbent”) workers. Meanwhile, a series of state-sponsored and private initiatives, along with a series of competitive U.S. Department of Labor grants — and, more recently, components of the American Recovery and Reinvestment Act of 2009 — incorporated elements of advancement training and workplace-linked training. Fort Worth's experience adds to this growing body of practice and involved a very particular service package:

- An exclusive focus on employed, low-wage workers

- Group training delivered within workplaces, led by instructors contracted from local community colleges, using a curriculum incorporating both basic skills and work skills
- Individual coaching and work support assistance before, during, and after training
- A workforce development agency in the lead implementation role

## **Employer-Based Services in the WASC Demonstration**

### **Rationale for Providing WASC Services in the Workplace**

In addition to providing evidence about the program’s potential effects on low-wage workers, the WASC demonstration sought to learn whether its services could help meet goals that are important to many employers: stabilizing and strengthening the performance of entry-level workers and developing their skills to the point where they would be qualified to fill midlevel positions. WASC employer-based services were intended to examine this question within a somewhat narrower context: locating WASC services within the workplace and linking them directly with goals articulated by the particular employers that participated in the project. There were several reasons to attempt this approach:

- First, recruiting WASC participants through the workplace could mean gaining access to certain low-wage workers who might not otherwise be reached via WASC marketing efforts within the wider community — in particular, workers who had not already established connections to publicly funded work supports or employment services.
- Second, developing the services in collaboration with each WASC employer could mean increasing the relevance of career coaching to WASC participants’ current jobs and workplaces — which, in turn, might yield better results for both the employer and the employees. WASC sought out employers that had second-tier job openings that could be filled by their own entry-level workers, if given the right skills training.
- Third, it was hoped that employers would endorse WASC in order to establish its credibility among employees — thereby motivating employees to take part in WASC activities.
- Fourth, and perhaps most important, offering services at the workplace — preferably on company-paid time — was a way to make WASC more con-

venient for workers. Participants would not need to make an extra trip to a One-Stop Center to receive WASC services.

MDRC developed WASC employer-based services in part based on operational lessons from a previous demonstration, the Achieve program in Cleveland, which provided on-site services in the workplace to increase employment retention among low-wage workers.<sup>3</sup> A common challenge for programs providing retention and advancement services is the difficulty of engaging clients, whose work and family responsibilities often leave little time to visit program staff. A key idea behind both Achieve's model and WASC's employer-based model is to bring the program to the workers — making it easier and more convenient for them to take advantage of services. Employees at Achieve employer sites were more likely than those in a control group to receive job retention services, but it was difficult to sustain engagement. WASC sought to increase the intensity of contact seen in the Achieve model, in part by offering employees a more direct opportunity to plan, get training, and work toward job advancement.

### **WASC Sites' Efforts to Build Employer-Based Services**

Each of the four WASC sites sought to offer workplace-based services as one component of its program. Bridgeport, Dayton, and San Diego found it difficult to do so. In part, this was because their primary, One-Stop-based WASC activities were labor-intensive to start up and operate. Within a period of about 18 months, each site had been asked to recruit between 800 and 1,000 low-wage workers — a population that was not strongly represented among the sites' existing base of customers, most of whom were unemployed job-seekers. Meeting these recruitment targets was a large task for each site.<sup>4</sup> Delivering WASC services was also hard work, because WASC introduced a new, more complex package of services than the One-Stops' customary offerings. Hence, introducing a secondary, employer-based program component meant adding an extra layer of complexity. As a result, WASC employer-based services came second — in effect, came last — both chronologically and in terms of WASC staff time and resources.

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<sup>3</sup>Cleveland Achieve was among 16 models tested by MDRC in the national Employment Retention and Advancement (ERA) project. The Achieve program consisted of on-site delivery of case management services, whereby staff met individually with clients to discuss a wide variety of issues, ranging from workplace and housing problems to transportation and child care; weekly information sessions covering such topics as time and stress management, goal-setting, budgeting, and credit repair; and trainings for the supervisors of low-wage workers. For a description of Achieve's implementation and early impact results, see Miller, Martin, and Hamilton (2008); final impact results are presented in Hendra et al. (2010).

<sup>4</sup>WASC's enrollment target was initially higher: 1,800 study participants per site. Because of an unanticipated cut in WASC demonstration funding by an anchor funder and a consequent six-month delay in program start-up — and in recognition of the considerable marketing effort that sites found that they needed in order to recruit from a low-wage worker population — MDRC reduced WASC's enrollment target and extended the recruitment period.

The WASC package of work supports and advancement services was unfamiliar to employers, and the sites' WASC service providers had no previous experience in marketing such a program to employers. Although many companies were interested in upgrading the skills of their workers, WASC's emphasis on low-wage workers and individual advancement may not have resonated with many of the employers that were approached by the WASC staff. Some workplaces simply did not offer a substantial number of midlevel opportunities into which entry-level workers could advance. Also, some employers were uncomfortable with the requirements of the WASC study design, which called for half of all study enrollees to be assigned to a control group that would receive no WASC services; such employers indicated that they would prefer to offer the same opportunities to *all* interested employees.

Even once a promising workplace had been identified, it was impossible to predict what portion of employees would meet WASC's income eligibility guidelines, which took into account employees' family size and total family income — information generally not known to employers. WASC's target group of employees was defined as having a wage of \$15 per hour or less *and* a total family income at or below 200 percent of the federal poverty level. This made it difficult both for WASC staff to plan program services with employers and for employees to gauge whether they might be eligible. For example, in one workplace site, after a small number of employees completed the eligibility screening and were found to be income-ineligible, other employees avoided applying for the program because they assumed that they, too, would be ineligible. In the end, the combined efforts of the Bridgeport, Dayton, and San Diego sites led to only a small number of employer-based WASC enrollments.

As part of a local effort to increase the involvement of the workforce development system in incumbent worker training, the Fort Worth site elected to deliver all WASC services through employers, rather than making a One-Stop its main venue for service delivery. MDRC had intended to study the effects of the Fort Worth program and also to pool its sample of study participants with those who had been recruited via employers in the other three WASC sites. Unfortunately, like the other WASC sites, Fort Worth ultimately was not able to meet its employer-based recruitment goals. After initial efforts yielded very low enrollment numbers, Fort Worth WASC managers and MDRC agreed to simplify the program's eligibility guideline by establishing a lower wage cap of \$11 per hour — and eliminating the family income cap.<sup>5</sup> This change was considered to be a trade-off: it would help boost the number of WASC participants, but fewer of those participants would have family incomes low enough to qualify for WASC-targeted work supports, such as food stamps and subsidized health insurance.

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<sup>5</sup>In the other three WASC sites (where overall recruitment was comparatively strong), eligibility for employer-based recruitment was kept consistent with the sites' One-Stop-based eligibility guidelines in order to maximize the number of WASC study participants with family incomes at or below 200 percent of the federal poverty level.

Simplifying the eligibility guideline did, in fact, boost enrollment numbers. Also, with each successive workplace outreach effort, the WASC team became more adept at recruiting employees into the program.

Nevertheless, within the time frame of the demonstration, Fort Worth was not able to enroll enough individuals to support a separate analysis of the impact of WASC's employer-based services. In four employer workplaces, random assignment of employees (into either a WASC program group or a control group) was conducted from November 2006 through September 2007. Despite the inclusion of two large employers, recruitment numbers were very low throughout the period (For these four employer sites, WASC's employee recruitment totals were 8, 10, 44, and 25.) As is discussed in this report, WASC staff in Fort Worth believed that the use of random assignment discouraged employers and employees from participating. Outcomes for employees who received WASC's employer-based services were to have been compared with results for a control group of employees from the same workplaces. As recruitment of Fort Worth employers and employees progressed, it became clear that there would not be enough time to recruit a sufficient number of study participants in order to conduct an analysis of the impact of the program, with enough statistical power to measure the effects of the program. In October 2007, MDRC and Fort Worth decided to eliminate the control group and, instead, enroll all interested (and eligible) employees into the program. Service delivery was continued in order to conduct a qualitative study of the implementation of the program. This report presents that implementation analysis.

### **WASC Implementation in Fort Worth**

Between early 2006 and mid-2008, Fort Worth was able to engage seven employers and to enroll more than 200 of their employees in the project. Program recruitment, enrollment, and implementation proceeded as follows:

- Employer recruitment began in 2005.
- Initial pilot enrollment of employees began at two employers in early 2006. The first round of skills training classes was held at these two employers in mid-2006.
- The full package of WASC services — including training, career coaching, and work support screening — was delivered at five additional employers, beginning in late 2006.
- Once enrolled, most WASC participants received four to eight weeks of skills training and one year of individual coaching and work support screening.

- The final round of WASC skills training classes was held in summer 2008.
- Follow-up meetings between participants and WASC coaches continued through early 2009. A final participant-coach meeting typically included review of the participant's job and career plans but no formal transition plan.

In the context of the WASC demonstration, Fort Worth offers unique operational lessons about recruiting employers and their lower-wage employees and about delivering work supports and advancement services in the workplace. Beyond the WASC demonstration, other initiatives have brought work supports or advancement services to low-wage workers through their employers, but they rarely provided both in a single program.<sup>6</sup> Importantly, many of the Fort Worth WASC employers provided paid release time to allow employees to receive individual and group services. A closer look at Fort Worth can identify the elements of WASC services that proved most attractive to employers and employees, how closely those who responded matched those who were targeted, what it took to build working partnerships, what forms the services took, and some of the short-term outcomes of those services.

This report describes how the Fort Worth team built an employer-based advancement program, the decisions that the team made about recruitment and services, and the implications of those decisions for subsequent service delivery. It also explores such issues as the tension between employer interests and worker interests within an advancement-focused program; whether meaningful training can be developed when the audience is a broad cross-section of entry-level employees; how employees respond to a program offered on-site and whether employees want to take time to speak with career coaches; how the services can be delivered without interfering with work processes; and whether, in general, the model would be feasible on a larger scale.

This report does not examine the effects of the Fort Worth WASC program on participants' earnings, receipt of work supports, or subsequent employment patterns following their

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<sup>6</sup>For example, the Ford Foundation-funded Supporting Work Project, managed by the Families and Work Institute, has included a wide variety of local initiatives to connect low-income workers to publicly funded benefits via their employers; for the most part, however, these initiatives do not connect workers to employment and training services. Conversely, some employer-based worker training programs — particularly in industry sector initiatives — offer connection to individual, often community-based case management. Even so, a formally designed connection to both training and work supports is not widespread, outside welfare programs. That said, some labor market intermediaries (typically private nonprofit organizations rather than public workforce development entities) have combined job placement, training (entry-level and advancement), financial supports for incumbent workers, and connections to employer tax incentives (such as the Work Opportunity Tax Credit) in a package targeted at employers of low-wage workers. For examples of these types of models, see Conway, Blair, Dawson, and Dworak-Muñoz (2007); Martinson, Winston, and Kellam (2007); and Seaman, Hoover, and Kaplan (2007).

participation in the project. During the service delivery period, a small proportion of WASC participants did attain promotions or merit-based pay increases. However, MDRC did not collect data to analyze whether these advancement outcomes might have occurred in the absence of WASC. By early 2009, in response to reduced demand for their products and services, two of the participating employers reported having implemented layoffs — but not of employees who had participated in WASC.<sup>7</sup> Here, too, it is unclear whether participation in WASC influenced whether employees subsequently were laid off; long job tenure was likely more important.<sup>8</sup>

The observations in this report are drawn primarily from program operations in five Fort Worth employer workplaces where a package of WASC services was offered to the 167 individuals who chose to enroll in the WASC study and were eligible to receive its services.<sup>9</sup> Examples are presented from three employers in particular, which together accounted for more than 90 percent of Fort Worth participants: a midsize manufacturer of sporting goods and other household products, a growing cell phone repair and logistics facility, and a large resort hotel. The report also incorporates insights on curriculum development and classroom training from two early pilot employer sites where the Fort Worth team provided employee skills training but not the full package of WASC services (which, in addition to training, included individual coaching and screening for work supports).

Data sources for this report include interviews with participating Fort Worth employers and employees as well as WASC site staff, managers, and training instructors. Focus group interviews were held in 2008 with a total of 14 participating employees from the two largest employers. Site visits were conducted at four of the five full-service workplace sites.<sup>10</sup> The report also presents data describing the individual and family characteristics of Fort Worth participants and draws from program data on participation in training, coaching, and work support services. Lastly, on the topic of employer and employee recruitment experiences only, it incorporates insights from WASC program managers and frontline staff members in the other three demonstration sites: Bridgeport, Dayton, and San Diego.

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<sup>7</sup>One of these employers was a manufacturer of household consumer products, and the other was a hotel.

<sup>8</sup>At these two employers, most participants had been at their jobs for at least three years prior to enrolling in WASC.

<sup>9</sup>As mentioned at the beginning of this section, just over 200 employees were enrolled in the project at seven employers. Of these, 167 were assigned to the program group and received WASC services; 42 individuals were randomly assigned to the control group and, therefore, did not receive WASC services.

<sup>10</sup>As part of these visits to four workplace sites, MDRC researchers observed participant interactions with WASC site staff, met both formally and informally with the firms' managers and with participating employees, observed one classroom training session, and observed the day-to-day work performed in each workplace. A fifth full-service employer site was not visited, but MDRC conducted a telephone interview with that site's human resource manager.

The report next briefly describes the components of the Fort Worth WASC program and the local team that implemented it. Then it explores the steps that were taken to engage employers and employees and the characteristics of those who came forward to participate. That is followed by detailed descriptions of the three types of WASC employer-based services that were delivered: individual job and career coaching, customized group training, and help for employees interested in applying for financial work supports. The report concludes by summarizing the strengths and limitations of the WASC employer-based program model and outlining a set of unanswered questions about the benefits and costs of offering employer-based services to low-wage workers.

## **Fort Worth's Employer-Based WASC Program**

The WASC program in Fort Worth was implemented in workplace settings, among low-wage employees — most earning \$11 per hour or less — at participating employers. MDRC selected Fort Worth as one of the WASC demonstration sites primarily because of the local operating partners' strong interest in implementing an employer-based program and their past experience in managing and delivering workplace-based training and postemployment services.<sup>11</sup> In addition, like the other three sites that were selected for the demonstration, Fort Worth raised local funds to support its WASC operations.<sup>12</sup>

Fort Worth also offered the opportunity to test a unique approach to the work support component of WASC. In 2005, the State of Texas Health and Human Services Commission (HHSC) announced plans to revamp the administration of social welfare benefits, including the State Children's Health Insurance Program (SCHIP), Medicaid, food stamps, and Temporary Assistance for Needy Families.<sup>13</sup> For these programs (with the exception of initial food stamp applications, which would continue to require an in-person visit and fingerprinting), application and renewal processes were to be shifted from largely in-person applications to applications conducted primarily by mail, phone, fax, and Internet. About one-third of Texas's then 310

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<sup>11</sup>The local partners' experience included operating a postemployment program as part of another MDRC demonstration, the Employment Retention and Advancement (ERA) project.

<sup>12</sup>Local funding became critical to the success of the project after mid-2005, when a major funder of the national WASC demonstration reduced its support.

<sup>13</sup>In 2003, the State of Texas had enacted legislation directing agencies that provide health and human services to consolidate organizational structures and functions, eliminate duplicative administrative systems, and streamline processes. The act called for the introduction of call centers, if cost-effective, to be used to determine, certify, and recertify eligibility for a variety of public benefits and programs, and it authorized the HHSC to contract with private entities to operate such call centers (State of Texas Health and Human Services Commission, 2005).



welfare eligibility offices were to be replaced by four central call centers.<sup>14</sup> In this context, Fort Worth and MDRC envisioned that WASC *workforce development staff* would guide participants through the application process for work supports using these new, remote systems — rather than including benefits eligibility specialists (from the welfare agency) on the WASC service delivery team, as in the other WASC demonstration sites.

However, during the course of Fort Worth’s WASC service period — which ran, following a brief initial pilot, from November 2006 through June 2009 — most of the state’s planned changes were canceled, scaled back, or placed on a slower implementation timetable. The new practices were not implemented in the Fort Worth area (although local HHSC offices did see some reductions in staffing). Given the timing of this reversal, field testing of the WASC program’s work support component was partly undermined because it had been designed to operate within a program and policy context that did not materialize. Instead, the WASC program staff did their best to guide WASC participants through the *existing* systems for application and renewal of social welfare benefits that support work.

## **WASC Management, Program Funding, and Staffing**

### *Management*

The Fort Worth WASC program was managed by Workforce Solutions for Tarrant County, the workforce investment board for Greater Fort Worth. The board was responsible for administering all Texas workforce programs for Tarrant County, including WIA job training and placement programs, job-seeker and other employment services, child care subsidies, and employment and training components of the TANF and food stamp programs. The board had a history of managing workforce skills-upgrade training initiatives in collaboration with local employers, and it sought to expand these training programs to an important and underserved population of employed workers: entry-level, lower-wage employees of local firms. It also saw potential value in bringing WASC’s additional supports and services — individual coaching and work supports — to complement this workplace-based training.

In designing and implementing WASC, Fort Worth’s workforce investment board played the role of intermediary and program manager. It recruited the targeted firms and worked directly with them to identify the targeted workers; designed nearly every aspect of the program (with input and technical assistance from MDRC), from recruitment to coaching protocols to data collection; selected and worked very closely with the community college partners that

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<sup>14</sup>Applicants would also still have the option of making an in-person visit to one of the remaining eligibility offices.

would deliver the training; selected and supervised frontline staff who would deliver WASC coaching services; and managed the program on a day-to-day basis.

### *Funding*

Fort Worth paid for its WASC services primarily using discretionary WIA dollars. This discretionary funding, rather than WIA formula funding, allowed Fort Worth flexibility to establish eligibility guidelines, enrollment procedures, and program performance criteria that were appropriate for WASC's employed-worker population.<sup>15</sup> For example, Fort Worth streamlined the process of conducting WIA eligibility screening and enrollment, reducing documentation to the minimum required to establish basic WIA eligibility (age, citizenship or right to work, and proof of Selective Service registration); verification of Social Security number or taxpayer identification number; and wage eligibility (using only an employee's pay stub or the employer's attestation). Fort Worth placed a priority on making its intake process as simple as possible for participating employees and employers, even when that came at the cost of the WASC staff's time. For example, it was not unusual for the Fort Worth WASC staff to use their access to state-administered databases to help document applicants' eligibility, rather than requiring applicants to furnish all the documentation themselves. Since most Fort Worth WASC participants were also enrolled in WIA, streamlining the enrollment process was an important accommodation to the workplace setting, where employees had limited time to spare during the course of their workdays.<sup>16</sup>

A second source of flexible WASC funding came in the form of direct site payments from MDRC to support the demonstration. While this funding covered only a small part of the cost of operating the Fort Worth program, it helped make it possible for Fort Worth to dedicate to WASC a larger and more experienced complement of staff than would likely have been possible using only WIA funds. It also provided flexibility to offer supportive services that

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<sup>15</sup>Like 34 other states, the State of Texas possessed a federal waiver that allowed it to convert a portion of its federally allocated WIA formula funds (funds that are earmarked for Adult and Dislocated Worker services under strict guidelines provided in the WIA law) to be used instead as discretionary funding for incumbent worker training or statewide employment and training activities. Texas localities, including Workforce Solutions for Tarrant County, were granted permission to convert Adult and Dislocated Worker funds to discretionary Local Activity funds. These flexible funds are over and above the standard statewide 15 percent allocation of discretionary funding provided to each state under WIA. This was the funding stream used by Fort Worth for WASC (State of Texas Workforce Commission, 1998; State of Texas Health and Human Services Commission, 2005; U.S. Department of Labor, Employment and Training Administration, 2008).

<sup>16</sup>Because intake for the WASC research study also required collection of additional demographic data, the complete WASC intake process was more lengthy and complex than it would have been had Fort Worth been operating a WASC-like program in the absence of the WASC research study. Whenever possible, the staff aimed to ask each participant an intake question only once — even when that meant transcribing data from one form to another, in order to reduce or eliminate repetitive questions.

might fall outside what WIA funding could cover. For example, WASC funding helped cover selected costs of tuition, transportation, or child care services that exceeded established WIA dollar caps or that for other reasons were not eligible to be covered by WIA under federal, state, or local rules. In addition, the direct WASC funding allowed the program to serve a small number of participants who were not WIA-eligible.<sup>17</sup>

### *Staffing*

There were two teams of WASC staff in Fort Worth. First, the responsibility for engaging employers was assigned to Business Services representatives and managers, who marketed the project to local companies, identified potential employer partners, and extended the initial invitation to participate. The Business Services team leveraged its employer contacts and its past experience in developing employer-driven placement and training services. At the same time, WASC was a new and somewhat different service to market, in that it was exclusively for low-wage workers who were currently working in entry-level and lower-skill jobs at the targeted companies. The employer recruitment team also needed to learn how to market a program that offered not just training alone but also individual employee job and career coaching as well as screening for work support eligibility; these services were not typically part of what Fort Worth had offered to employers in the past.

Once employers agreed to participate, they were assigned to a second group of project staff, which had responsibility for designing and delivering a specific set of WASC services for each workplace setting. This second team — which consisted of two or three job and career coaches, a team lead, and a program manager — brought experience with providing employment services, supports such as assistance with child care and transportation costs, and case management to low-wage and low-income workers.<sup>18</sup> For this team, the newest elements of WASC were that services would be brought to the workplace and that participation would be entirely voluntary (that is, not required as a condition for receiving some other publicly funded service or benefit). These were important program differences that required the frontline team to invent new methods of recruiting and sustaining the engagement of participants. In addition, the

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<sup>17</sup>A small number of male WASC participants were not eligible for WIA (and other federal programs) because they had been born after January 1, 1960, and had failed to register for Selective Service while residing in the United States between the ages of 18 and 25, as required by U.S. law; although they were over age 25 at the time of their enrollment in WASC, they were ineligible for WIA because they had failed to register at the required age. These individuals nevertheless were allowed to enroll in WASC; MDRC funds were used to provide WASC services to them.

<sup>18</sup>WASC was designated as a special project of the workforce investment board, independent of One-Stop operations; the board contracted with the independent operator of Fort Worth One-Stop Career Centers to provide WASC frontline staffing. Throughout the implementation of WASC in Fort Worth, the frontline project team divided its time between WASC and one or two additional workforce projects. Averaged over the duration of WASC, team members each spent just over half their time working on it.

team was responsible for identifying instructors from local community colleges to provide group training for participants, developing training curricula in collaboration with employers and the community college, and coordinating all logistical aspects of the training. These activities, too, were new to the frontline team (though not new to the workforce agency itself).

### **Components of Fort Worth's Program Model**

WASC employer-based services in Fort Worth consisted of three components: skills training, job and career coaching, and income supports.<sup>19</sup>

- **Skills training.** WASC group training was provided on-site at employers' locations, usually with paid release time — although not always during employees' regular shifts.<sup>20</sup> In each workplace, the training was intended to address a set of employee skill gaps that were identified by the employer. Most of the classes consisted of basic skills training in computer applications and/or English language instruction, tailored to day-to-day work tasks and communications that employees would encounter on the job. Fort Worth contracted with community colleges to help develop the curricula and deliver the instruction. In order to maximize the number of participants served using the WASC project funding, training in most workplaces was delivered on a one-time basis (usually for a period of four to eight weeks), not as a continuing program.<sup>21</sup>
- **Job and career coaching.** Individual coaching was a core element of the WASC demonstration, and Fort Worth provided on-site coaching to employees at each workplace. Participating employees were asked to identify specific goals for their job, career, and income and to meet individually with a coach before, during, and after taking part in group skills training. Coaches also connected participants with additional opportunities for education, training, and supportive services, and they encouraged participants to contact their coaches if they needed help resolving work-life conflicts or difficulties on the job. Job advancement coaching was constrained to focus

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<sup>19</sup>For a discussion of the range of potential services for low-wage workers once they find employment, see Martinson and Holcomb (2007).

<sup>20</sup>In order to participate in the training, some employees had to arrive prior to — or remain at work after — their regularly scheduled shifts.

<sup>21</sup>There were exceptions: At one pilot employer (which received services early in the project, when training funds were in greater supply), and then at one subsequent employer, the Fort Worth team was able to provide a second round of classes to a new group of employees. In addition, two workplaces each received two nearly-concurrent classes covering different subject matter; these classes were attended by overlapping groups of employees.

on advancement openings found at the current employer.<sup>22</sup> Employees were encouraged to move up at their existing employer by building tenure, increasing skills and certifications for more advanced positions or assignments, making advantageous transfers to other departments, or increasing their work hours.

- **Income supports delivered via employers.** In helping to bring work supports to employee participants, WASC had two objectives: (1) to make work pay by supplementing earned income, bringing total income to a level that could sustain a basic family budget; and (2) to facilitate participation in education and training, by offering to cover employees' training-related costs, such as alternative transportation or child care (for employees who attended training outside their regular work shifts). WASC did not intend to foster long-term reliance on income supports. Rather, it aimed to supplement the income of low-wage workers in the short term and, through job advancement, to increase their earned income in the long term — so that they would no longer need income supports. Fort Worth staff made participants aware of supports for which they might be eligible and helped them to navigate the application processes required by the public agencies that administered these benefits.<sup>23</sup>

In combination, and directed to a population of low-wage workers, these three components made up an approach that was different from existing services for employed workers, as had been previously provided by the Fort Worth workforce investment board. As a package, the WASC program in Fort Worth had the following distinguishing characteristics:

- Engaging *low-wage* workers in advancement activities *at their work sites*
- Focusing skills training on *modest, short-term improvements in employees'* basic skills and viewing it as a potential first step to learning more advanced skills in the future (though advanced skills training was beyond the scope of the program as implemented)

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<sup>22</sup>It would be possible to design a project that included a network of employers willing to pool their advancement openings. In such a setting, career coaches could openly counsel an employee of one company about advancement opportunities at another company. However, WASC was not structured this way.

<sup>23</sup>In the other three WASC demonstration sites, application processes for work supports were simplified to the extent feasible — for example, by combining application forms and reducing documentation requirements. However, the Fort Worth WASC program did not simplify or streamline application processes, except in the case of child care subsidies and transportation assistance — which the Fort Worth team administered directly.

- Asking individual workers *to identify specific goals for job, career, or earnings* and periodically discussing those goals with them
- *Managing the potential tension* between employers' workforce goals and an individual worker's career goals
- Continuing to provide coaching or case management to participants *even if they left their initial employer*<sup>24</sup>
- Using flexible, discretionary *funding to support the package* of workplace-based group training, individual coaching, and work support screening services to employed workers

Although Fort Worth had offered some of these elements to workers before WASC was implemented, the combination was new.

## Engaging Employers and Employees

Fort Worth had aimed to recruit at least 800 low-wage and/or low-income employees to take part in the WASC project.<sup>25</sup> It was estimated that at least five workplaces would be needed to yield 800 enrollees — depending, of course, on the size of the workforce in each workplace and the proportion of employees who were income-eligible and who volunteered to participate.

Although the Fort Worth WASC program promised to provide a variety of resources and services to support workers, the particular services would be customized to each workplace and to each enrolled employee; participating in WASC would mean different things to different people. For this reason, the Fort Worth team initially found it difficult to articulate what employers and employees could expect to gain from being in the program. However, as recruitment progressed over the course of several months, the WASC staff became more adept at defining and describing — to both employers and employees — the potential benefits of participating.

WASC sought to meet important needs of both firms and workers, but few of those needs were perceived as being particularly urgent. By comparison, non-WASC services offered

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<sup>24</sup>Employees who left their initial employers were invited to continue to meet with their WASC coaches by telephone or in person at mutually convenient locations.

<sup>25</sup>As discussed above in this report, half the employees (400) would have received WASC services, and half would have been assigned to a control group. Fort Worth ultimately recruited only 209 WASC-eligible employees; 167 received WASC services, and 42 were assigned to a control group. Because MDRC did not proceed with an experimental evaluation of the Fort Worth program, this report does not discuss the experiences of control group members or make comparisons between the program group and the control group.

through the workforce board were driven by shorter-term priorities: for unemployed or dislocated workers, finding a job (or getting trained for a specific job); for firms, filling open positions and training or retraining employees to help meet specific, quantifiable production demands. For the most part, employers were not able to leverage WASC services to meet their most urgent workforce needs. Rather, what the program had to offer was less immediate: for workers, incremental increases in income and incremental improvements in skills that might lead to career advancement; for firms, the potential for incremental improvements in employee skills, productivity, attendance, and retention. In order to recruit employers and their employees to take part in a voluntary, advancement-oriented program, the staff of the workforce board needed to clearly describe the services being offered, and they needed to convince both employers and employees that participating in the program could lead to real, if gradual, gains.

### **Engaging Employers**

The first step was to find suitable employers who would be willing to participate. Fort Worth aimed to work primarily with employers in the private sector, and it succeeded in doing so; six private sector firms and one public sector employer took part in the project. As members of the Fort Worth team reached out to employers to offer WASC services, they learned which elements had the most appeal and which types of employers were most likely to step forward.

#### *The Proposition Offered to Employers*

Fort Worth marketed WASC to employers by describing the types of benefits that might result from the program services:

- Training could improve employees' skills and productivity. On-site delivery of the training could encourage more employees to seek training and to complete it once they began.
- One-on-one coaching could help employees perform better in their current jobs and help them envision a career path at their current employer and the steps they could take to move up — which, in turn, might increase employees' participation in training and their engagement in their current jobs.
- In addition, coaches could help to stabilize employees and their families by connecting them to financial work supports and other supports available in the community, thereby potentially improving attendance and job retention.

Employers responded most favorably to the offer of skills training for employees. Not coincidentally, training was the component of WASC services that Fort Worth's Business Services team was most comfortable and adept at presenting to employers. As reflected in the following comments, at least one member of the team worried that the coaching and work

supports — in contrast to the skills training — might be associated with a social services stigma that would reflect unfavorably on employees (suggesting that they needed extra help meeting job expectations) or unfavorably on employers (suggesting that they did not pay enough):

I knew from the outset that if we came in and tried to identify it as a low-skill demonstration project, I don't think we would have had some of the success that we did have with it. . . . Over the past 10 years, we have marketed ourselves as a business [focused] entity. We tried to get away from the stigma that all state agencies such as ours were social service agencies. So, for this particular project, we wanted to make sure that we identified it as a *training* project and stayed away from the case manager, job-coaching stuff.

— WASC Business Services Representative

When first presented with the full list of services that WASC had to offer, some targeted employers mistakenly assumed that the program was aimed either at employees who had been placed into jobs by welfare program employment services or at employees who had severe attendance or job performance problems. Even so, the Fort Worth team believed that if it could get employers to try the program, they might find its stabilization-focused services to be valuable for a broader group of workers:

Everywhere we go now, employers are talking about how employees are moving from one job to the other, for just small amounts of money. I think this is an aspect of [WASC] that employers should find attractive — it gives this population almost like a new job, and more money [without leaving the current employer]. . . . But depending on who your audience is, if it sounds too “social-servicey,” they just don't listen to the rest of the story. And so I think we all struggle with what's a fast way to get that message across . . . before they don't listen to you anymore.

— Fort Worth WASC Administrator

Of the employers that eventually agreed to participate, two initially expressed concerns that WASC might unrealistically raise employees' expectations for faster promotions or pay raises. When pitching the project to employers, the WASC staff tried to convey that the program's career coaching would encourage employees simultaneously to be optimistic and realistic about their prospects, which could, in turn, have the effect of strengthening employees' attachment to their current jobs. Since the participating companies could not promise to promote every employee who participated in the project, it was important to convey that there would be other tangible rewards for every employee who signed up for the program. Several employers responded favorably to the suggestion of a training program focused on basic workplace English and basic computer skills, customized to specific workplace conditions and work processes. Perhaps because WASC offered training that was short term and not heavily technical, these employers did not seem to be worried about the prospect that they might invest time



and resources to train employees, only to have the newly trained employees quit in order to seek more advanced jobs at other firms.

Having assumed that business executives were concerned primarily with profitability, Fort Worth staff had rehearsed arguments for how the project might help a company's bottom line — leading to higher productivity as a result of training, for example, or to more reliable attendance, thanks to child care assistance. Yet, as it turned out, many senior company managers seemed receptive to the idea that the program simply could help their employees; these employers were prepared to cooperate with the project and to offer employees release time to help make it possible, without examining too closely the claim that the services might lead to improvements in productivity or attendance. Some employers pointed out that they liked the idea that the program was connected to a research study that would measure the results of the services. Nevertheless, the employers that ultimately chose to take part in WASC were willing to do so without knowing many specifics of the service content and without hard evidence that the program would help overcome workforce-related challenges.

The Fort Worth WASC team sought ways to hold down the costs to employers for participating in the project — in terms of managers' and employees' time and training or meeting space. Both Business Services staff and the frontline WASC staff assured employers that the program would have a "light footprint" in the workplace — that is, it would not be overly disruptive to work flow nor require too much managerial time. Finally, what many employers said they wanted most was some assurance that the program would be well executed — for example, would have worthwhile training content, strong instruction, and good attendance. Senior managers at one company emphasized that they did not want WASC to repeat disappointments that their employees had experienced in the past with (non-WASC) English language courses.

### *Targeting Suitable Workplaces*

The rationale to offer WASC employer-based advancement services was based in part on the assumption that some employers — having large staffs of low-wage, entry-level workers — had difficulty filling second-tier positions and could better tap their entry-level workforce to fill those second-tier jobs. For example, hospitals with many orderlies had difficulty finding nursing assistants or phlebotomists. Manufacturers had assemblers but needed quality-control inspectors. Companies in many industries needed to fill frontline supervisory positions but found that sometimes small barriers prevented them from promoting entry-level employees into those positions. Fort Worth set out to find and recruit this type of employer.

Although Fort Worth located employers that had second-tier openings, the number of advancement opportunities was not as high as had been hoped. Early on in the project, MDRC and the Fort Worth site sought to identify employers that could offer potential internal ad-

vancement opportunities — in the form of raises, increased hours, promotions, skill certifications, or better benefits — to roughly 50 percent of entry-level workers over the six-month period following the beginning of WASC services in each firm. However, it proved very difficult for employers to project this number and to meet this target. The target eventually was replaced by a more general assessment of advancement potential within the firm.

Furthermore, in many targeted firms, an important subset of entry-level employees faced considerable gaps in basic skills or technical skills — gaps that they would need to close before becoming eligible for promotion. A related factor was that many of the targeted employees had considerable tenure in their current positions, and some were reluctant to move into the types of work and work conditions that would be required, were they to move up to second-tier jobs. (These challenges are discussed further below.)

### *Securing a Partnership to Move Forward*

Fort Worth elicited interest in the initial proposition from a dozen employers, which were identified through local chambers of commerce, through the state workforce development agency, or through other existing partnerships with the workforce investment board that managed WASC. After securing this initial interest, the WASC team developed a work plan and a contract with the employer that outlined when, where, and how the services would be delivered. It took a significant amount of time — often several months — to define the specific WASC services that would be delivered at each company. Some employers drifted away from the project during this stage — simply by failing to initiate follow-up steps required to move it forward — without explicitly declining to participate. Most of the companies that followed through to implement WASC had a history of collaborating with the workforce investment board on past training programs or other workforce development initiatives. Some also served on the board.

Striving to recruit a large number of WASC research participants within a short time, Fort Worth could not always afford to wait for employers who were moving on a slower timeline.<sup>26</sup> While the compressed timeline of the WASC demonstration was an acute constraint for MDRC and for the Fort Worth site staff, the employers were under no internal pressure to move quickly or, indeed, to participate at all. It was easy for employers to drop out of the program development discussion at several points, before reaching a deal.<sup>27</sup>

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<sup>26</sup>In the absence of a research study, the timeline could have been extended. As discussed above, the research timeline was further compressed by an unanticipated funding cut to the demonstration and by a related six-month hiatus in program development.

<sup>27</sup>More generally, workforce investment boards across the United States have had considerable difficulty in engaging employers to take part in WIB-sponsored training initiatives. As in WASC, this challenge seems to  
(continued)

In addition, because of the great effort that would be required to recruit individual employees within each firm, the Fort Worth team found it difficult to move forward with more than one company at a time. For the local project leadership, the rigors of working at the pace of business — inherently, sometimes slow and sometimes fast — made it difficult to plan and staff the pace of the WASC program rollout:

We had to be patient with our work with employers. . . . People want that to be fast, [but] it's always a labor-intensive process, and I think this project's been no different. Employers each want things tailored to their schedule. If they lose a [production] contract, everything goes a different way. . . . [In other cases,] they're told to speed up, for a variety of reasons. So it's kind of tough for us to adjust.

— Fort Worth WASC Administrator

The Fort Worth team learned that it needed to respond to several sets of interest groups within employers. Human resource managers were perhaps the most attuned to what the program had to offer, and typically they expressed a strong interest in providing employees with supports and advancement services. Senior executives also wanted to offer services of value to their employees, but they were sometimes openly skeptical about how the proposed services differed from efforts that had been undertaken in the past, and they were wary of the hidden costs of implementing the program. Frontline supervisors, meanwhile, were most concerned with meeting immediate productivity demands and were often initially resistant to allowing supervisees to participate. Fort Worth found that engaging frontline supervisors in the project was very valuable but difficult to accomplish:

If you're doing, let's say, a two-hour training session with the employee, even if you get the supervisor involved for 30 minutes of that two hours, [then] you're building more of a team with them . . . and then they feel like they're more a part of that project. [But] you've got to get them to see the big picture.

— WASC Program Director

### *Characteristics of the Employers That Participated*

Of about 30 employers that were approached directly about the WASC project, Fort Worth secured initial interest from a dozen and launched services in seven — two as part of the

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reflect a degree of mismatch — real or perceived — between the goals of the workforce system and the workforce goals of employers. Surveys conducted by Workforce Innovation Networks indicate that more than 90 percent of employers “have little to do with the federally funded system, largely because they feel that it is unresponsive to their needs . . . this is especially true of employers with jobs and career ladders offering family-supporting wages and benefits” (Workforce Innovation Networks, 2008, p. 2).

pilot and five more after the start of the study. The employers included two manufacturing firms, a logistics firm, two hotels, a small hospital, and a local public school district.<sup>28</sup>

- **Manufacturing.** The principal workforce concerns of these employers were reliability, safety, and productivity. For one firm, advancement of a subset of employees was a clearly articulated goal: employees worked their way through employer-defined “skill sets,” which included tests of productivity, mastery of production machinery and processes, and safety policies. The time required to progress through each skill-block level depended on the demands of the business cycle and employee performance, but ideally it took about two months. Managers at the company explained that several employees who were targeted for WASC seemed ready to acquire the next skill block but lacked sufficient English language skills to communicate effectively if promoted to supervisory positions. Both the manufacturing firms saw WASC as a means to improve day-to-day communication on the production floor, and they requested multiple English and Spanish language courses from WASC. In addition, for a small group of employees, WASC provided supervisory skills training and forklift operators’ training.
- **Logistics.** Productivity and quality control were the main interests at the logistics firm that took part in WASC. For managers at this company, profit depended on the timely servicing and delivery of business materials — in this case, the repair and refurbishing of cellular phones. Damaged cellular phones were flown into Dallas-Fort Worth International Airport (DFW) and were delivered a few miles to the company’s facility, where a staff of more than 700 employees checked, repaired, and repackaged them and shipped them out through DFW. This company faced the dual challenges of growth and competition in an industry with a narrow tolerance for errors or delays. Managers explained that employees needed to improve their English communication skills in order to prepare adequate and timely documentation of cell phone problems and repair status. Too often, they explained, employees with weaker English skills relied on their coworkers to help them fill out documentation, which slowed the diagnostic and repair processes. This firm asked WASC to provide English language training as well as computer skills training to improve employees’ proficiency at using an inventory and repair-tracking database.

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<sup>28</sup>Of the twelve employers that expressed initial interest, five did not follow through to launch the program. Some found that they could not devote the time needed to implement it. Others determined that the program was not a good fit for their current workforce development needs.

- **Hospitality.** Hotel managers viewed WASC as a means to support employee morale, in a setting where morale could have an influence on the quality of staff interactions with hotel guests. Managers at both hotels hoped that employees would benefit from coaching to understand career paths within the hotels and that potential advancement would motivate strong job performance. Managers at one hotel explained that each of its guests made a decision to spend a little more than the market rate for a basic room, in return for the assurance of above-average customer service. Providing that kind of service also meant being able to perceive guests' unexpected needs and improvise to meet them — for which language skills are very important. Supervisors and managers emphasized that career advancement within the hotel would require greater English fluency than many employees had the time or opportunity to learn. While WASC could not provide the type of long-term instruction that would lead to fluency, it was able to offer English language classes with a focus on hotel-specific vocabulary.
- **Public school district.** For administrators at this employer, high turnover among school bus drivers resulted in perpetual training costs. In addition, each cohort of new hires was sent to a state training center at Texas A&M University, which made each class expensive. The school district asked WASC to develop a train-the-trainer course, in order to provide the school district with the capacity to train its own drivers.<sup>29</sup>
- **Health care.** Managers at a small, acute care hospital lacked the internal capacity to build the skills of employees in entry-level positions — custodial and food service workers. This employer sought to help these employees to think about longer-term career development. As a first step, WASC subcontracted with a local community college to provide training in basic computer skills and instruction in using Microsoft Office applications. WASC coaching also offered employees individualized attention that could not be provided by the human resources staff.

Table 1 summarizes the characteristics of the seven Fort Worth employers that participated in WASC and the types of skills training that their employees received.

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<sup>29</sup>The creation of the course also allowed the school district to provide training for drivers in nearby school districts. Involving experienced drivers in developing the course content helped lead to several important modifications of school bus training statewide, including the addition of components on night driving and cardiopulmonary resuscitation (CPR).

**The Work Advancement and Support Center Demonstration**

**Table 1  
Characteristics of Seven Employer Sites in Fort Worth and Training Provided**

Industry	Manufacturing (Pilot Site)	Manufacturing (Pilot Site)	Logistics	Large Hotel	Midsize Hotel	Small Hospital	Public School District (Pilot Site)
Business	home products	home products	cellular telephone repair	hotel (1,500+ rooms)	hotel (1,000 rooms)	acute care hospital (70 beds)	Transportation Division
Number of employees	600	850	700	2,000	900	120	260 (division)
Number of participants	43	165 (pilot)	125	23	10	8	200 (pilot)
Dates of services	05/07 - 05/08	04/06 - 04/07	08/08 - 06/09	07/07 - 12/08	05/07 - 05/08	11/06 - 11/07	06/06 - 06/07
Positions targeted	assemblers, machine tenders, materials handlers, packers, quality control inspectors, regrind operators, sewers	assemblers, packers, machine operators, frontline supervisors	electronic assemblers and technicians, inventory control clerks, quality control supervisors	housekeepers, retail associates, building services associates	housekeepers, banquet set-up staff, food services, front desk staff	housekeepers, dietary aides	school bus drivers
Average hourly wage	\$8.94	NA	\$9.39	\$8.51	\$8.06	\$10.11	NA
WASC-sponsored training	VESL, Spanish for Speakers of Other Languages	supervisory training course, VESL, "super" ESL, forklift training	VESL, basic computer skills, Microsoft Office applications	VESL, basic computer skills, Microsoft Office applications	no group training, 2 individual training vouchers issued to participants	basic computer skills, Microsoft Office applications	Train-the-Trainer course for school bus drivers

### *Employers That Declined to Participate*

Given that WASC sought to target only firms that had several key characteristics — a sizable number of low-wage workers, sufficient opportunities for advancement, and willingness to provide time and space for project staff to deliver services — the slow pace of employer recruitment is not surprising.

- Many employers that were approached about WASC did not turn down the opportunity outright but allowed it to pass by, failing to follow up on Fort Worth’s outreach efforts. Competing priorities in some companies meant that pursuing WASC never reached the top of the list — at least, not during the recruitment window for the WASC demonstration.
- Some employers had very few advancement opportunities to offer entry-level employees and therefore concluded that an advancement-oriented program did not make sense for them. (In a few instances, the Fort Worth project team itself came to this conclusion about a company, and it chose not to pursue a WASC program there.) Some employers may have feared that providing advancement services would lead to their losing employees to other firms.
- Somewhat surprisingly, given consistent labor market demand for workers at most levels in the health care sector, response was weak from the several health care employers that were approached about the project. One of these indicated that it would be difficult to integrate WASC into its existing staff development programs. It may be that health care employers already had considerable capacity to map out career paths for their employees and connect them to training — and therefore viewed WASC as offering little new value.<sup>30</sup>
- For some of the companies invited to take part in WASC, the demonstration’s random assignment research design represented an unattractive aspect of the project; some cited this as a reason for deciding not to take part.

A few employers indicated that they were uncomfortable offering WASC services to some employees but not to others (that is, those who were randomly assigned to a control group). At least one employer also worried that employees might not believe that the determination was truly random. This employer did ultimately participate in the project

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<sup>30</sup>The small hospital that did take part in WASC had more limited resources than these employers.

and did not encounter this problem with employees. In another employer site, however, some employees did complain to the human resources department after being assigned to the control group.

- In addition to WASC, Fort Worth offered alternative potential sources of funding for employee training. WASC was often presented as part of a portfolio of training options offered by the workforce board. As a result, employers may have viewed WASC as the one workforce program in which a company was allowed to train only half of those who signed up — the least attractive option to receive workforce training funds.

Despite these challenges, following the pilot in which two employers participated, Fort Worth was able to recruit five employers that agreed to take part in the project and help implement its random assignment research design. Random assignment was conducted at the first four of these. At the fifth employer, employee recruitment took place after MDRC and Fort Worth decided to stop pursuing an experimental study; therefore, WASC services there were provided to all eligible employees who enrolled.

### **Engaging Employees**

After securing a written agreement with a given employer (specifying the content and logistical details of the WASC services to be provided), the Fort Worth team began to recruit employees at the workplace. As team members began to market the coaching, training, and work support services to employees, they learned which elements of the program were most attractive to employees and which approaches seemed to convince them to participate.

#### *The Proposition Offered to Employees*

The project staff presented WASC services in terms of potential benefits for participating employees. Training could help them improve their skills or learn new skills; acquiring such skills could be a first step toward a potential promotion or wage gain. A personal coach could help them with career planning and potentially connect them to help with child care, transportation costs, or other benefits and services.

Initially, because of the experimental nature of the WASC study, during participant recruitment, MDRC asked Fort Worth not to specifically mention public health insurance, food stamps, the Earned Income Tax Credit, or the Child Tax Credit. The reason for this was that recruitment was conducted *prior to* the random assignment of employees. In the sites where random assignment was used, if control group members were made aware of these work supports, they might pursue them on their own — thereby diluting the potential impact of



WASC’s work support efforts. However, this was not a concern with child care and transportation assistance, which were administered directly by the workforce agency and, therefore, would only be available (to the employed worker population) through WASC.<sup>31</sup>

One of Fort Worth’s recruitment challenges was to explain to employees how the program might give them a better chance at securing a promotion or how it might lead to different advancement opportunities than those of which employees were already aware. Indeed, WASC could not promise to deliver those things. Furthermore, concrete plans for group or individual training would not be developed until *after* employees had enrolled and had met individually with their coaches. Therefore, during the recruitment stage, the Fort Worth staff could only assure employees that they would likely have the opportunity to receive work-related training:

We didn’t off the top know what kind of training [it would be]. We couldn’t tell them, “You’ll be doing computer classes.” We kept saying “advancement training,” but [employees kept asking,] “Well, what does that mean? What kind of training are we going to get?” Everybody wants to advance. Those that are willing to be helped, they go that extra step, and they say, “Okay, I’m going to take a chance on this, to see what this is . . . whatever I can get, that I don’t have, is going to help me in some kind of way.”

— Fort Worth WASC Career Coach

The WASC staff members who conducted the recruitment also emphasized that each participant would receive an individual coach — often, the same staff member who recruited the participant into WASC — to help them map out goals for increasing income and advancing on the job. Some employees seemed intrigued by this offer, although they may have found “career coaching” to be a concept that was even vaguer than “advancement training.” Like their employers, employees responded most strongly and favorably to the offer of advancement-relevant skills training.

As part of the recruitment process, WASC staff also needed to discuss with employees the random assignment design of the project. Random assignment would mean that, within a given workplace, only half of those who volunteered (and were eligible) would actually receive WASC services. Interested employees were told that if they were eligible and agreed to sign up, they would have a 50-50 chance of being selected at random. WASC staff explained that once an employee met the basic eligibility criteria (primarily, wage level) and agreed to be part of the study, no personal or employment characteristics (such as gender, ethnicity, hourly wage, job title, or tenure) would influence the random selection. Nevertheless, employees understandably sometimes confused the screening for WASC eligibility with the random selection process. Employees who were assigned to the control group (and were not to receive WASC services)

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<sup>31</sup>In other words, there was little risk that control group members might gain access to these two work supports on their own.

were often disappointed; some complained to their employers or coworkers. For these reasons, implementing random assignment within a workplace complicated recruitment.

### *Identifying Employees Who Were Suitable for the Project*

Fort Worth and MDRC needed to develop criteria for targeting workers who could actually benefit from WASC services — that is, employees who had room to advance and who might be eligible for financial work supports.

- Entry-level and low-wage workers were targeted in each participating workplace, with the intent of preparing these individuals for potential wage increases resulting from better performance, expanded duties, formal promotions, different shifts, or other incremental wage advancement opportunities available at their companies. As discussed above, this meant that it was important to work with employers that offered wage increments, achievable advancement opportunities, or both. As important, the project needed to seek out employees who were in positions from which they could advance.
- WASC also aimed to attract low-wage employees in *low-income households* who would be eligible for work supports in the short term. For example, to be eligible for food stamps, an employee’s household income would need to be at or below 130 percent of the federal poverty guideline. Other supports, such as the Earned Income Tax Credit and subsidized health insurance for children, continued to be available at somewhat higher levels of family income but were most likely to benefit those living at or close to 200 percent of poverty income. Therefore, because one of the chief goals of the WASC demonstration was to connect low-wage workers to supports for which they were eligible, the project initially set a household income cap as one eligibility criterion for employees to participate in WASC.

One concern in designing policies and programs for low-wage workers is that, despite their low wages, many such workers live in households with combined total income above, if not far above, the official poverty line. Thus, many *low-wage* workers are not necessarily poor; nor are they even *low-income* individuals.<sup>32</sup> Mindful of this, Fort Worth initially sought to recruit only employees whose earnings were at or below an hourly wage threshold (initially, \$15) *and* whose total household incomes were at or below 200 percent of the poverty level. However, when documenting total household income proved too difficult in a workplace

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<sup>32</sup>Households with incomes as high as 400 percent of the poverty line may still be considered “low-income,” though not “poor.” The WASC project in Fort Worth initially focused on the segment of low-income workers living in families at or below 200 percent of the poverty line.

setting, and when too low a percentage of low-wage employees proved to be income-eligible for WASC, MDRC encouraged Fort Worth to simplify its income eligibility guideline to a simple \$11 per hour wage cap.

This decision had several important implications. First, it made it simpler to identify employees who would be eligible to participate in WASC — and workplaces where large numbers of such employees could be found. It allowed employers and WASC staff to better estimate how many employees might take part in the project and to plan program activities accordingly. The change also made it easier for project staff and participants to complete the intake process by documenting their program eligibility, since hourly wage was simpler to document than total family income. On the other hand, eliminating the household income guideline created precisely the problem that the project, up until that point, had sought to avoid: although most participants had only one job, their total household income usually exceeded 200 percent of the poverty level — leaving very few participants eligible for most work supports offered by WASC.

### *Securing Partnerships with Individual Employees*

The employee recruitment effort was time- and labor-intensive. While recruiting employers required a series of short conversations and behind-the-scenes planning over several months, recruiting employees required Fort Worth staff to make many quick, face-to-face connections with employees in a short period of time. Project staff spent several weeks at each employer site, usually in employee cafeterias or break rooms, trying to recruit participants during moments when they were on break. Following is a typical comment about employee recruitment:

We were starting there around 7:30 or 8:00 in the morning and left at 4:00, and we were there, like, three days a week for three, four weeks. We might have talked to 40, 50, 60 people, where it was 10 minutes here, 5 minutes there, 15 minutes of their lunch: “If you don’t mind eating your sandwich, I’ll talk to you while you chew.” . . . There was a lot more time involved, because we went to them; they didn’t come to us.

— Fort Worth WASC Team Lead

In most of the targeted workplaces, the WASC staff’s outreach efforts were reinforced by posters, pay-stub envelope stuffers, company newsletter articles, and outreach by the company’s human resources staff. One of the tools valued most by the project team was a simple postcard that was handed to employees who passed by the WASC recruitment table or spoke briefly with WASC staff. It encouraged them to learn more about the program and gave instructions for contacting staff (including off-shift times and phone numbers to call). The postcards made it easy for employees to follow up later, at their own convenience. In this way,

the program staff members were able to speak individually with potential participants outside such hectic settings as lunchrooms.

Overall, the Fort Worth staff cited the cumulative power of repeated recruitment visits and positive word of mouth to generate enrollment numbers. Staff observed that, initially, it was sometimes difficult for employees to differentiate WASC from other programs and services being offered by their employers or by other providers (particularly, financial institutions) that were allowed direct access to employees in the workplace. In workplaces where managers or supervisors explicitly endorsed WASC activities — especially the potential for on-site skills training — WASC team members believed that the endorsement conferred on the program a greater degree of relevance and legitimacy that eventually led more employees to apply:

When they come and ask the questions and try to see — “Okay, well, what are you all really about? What is really going on? What are you really offering there?” — to me, that helps that employee, too. They see their manager or their supervisor or whatever asking questions. [Employees think,] “Well, hey, they really want to get me in. . . .”

— Fort Worth WASC Career Coach

The WASC staff learned from some employees that one or more family members had discouraged them from participating. Even after an individual enrolled, WASC career coaches noted that some participants (particularly, women in families that had immigrated to the United States) were discouraged from participating by their husbands or other family members, who — in cases where WASC participation would mean going to work early or staying there late — were concerned that it would interfere with their child care and other family responsibilities:

We told them about the advancement and training; they were interested, and a lot of them signed up. [But] a lot of them came back and said, “Well, my husband says I can’t do this.”

— Fort Worth WASC Career Coach

The WASC coaches noted, however, that several participants were able to overcome these difficulties by coordinating with other household members to make sure that their family responsibilities were covered while they participated in WASC.

Once they had decided to enroll, employees confirmed their commitment to participate by completing intake forms for the WASC program and the research study, furnishing documentation of their eligibility to receive publicly funded training and, once accepted, meeting with a WASC coach to map out career advancement and income goals.

### *Characteristics of the Employees Who Participated*

By eliminating WASC's eligibility guideline for household income and instead using a simple wage cap, the Fort Worth WASC project opened enrollment to employees from higher-income households.<sup>33</sup> Nevertheless, it was somewhat surprising that, following the removal of the income cap, nearly all participants came from households with total income at more than 200 percent of the poverty line.<sup>34</sup> This would make them ineligible for most of the publicly funded financial work supports targeted by the WASC program, other than tax credits.

Appendix Table A.1 presents detailed baseline characteristics of the Fort Worth WASC participants at each of the five employers that took part in the program after the pilot. In order to be eligible to enroll in WASC, employees who were recruited at the first Fort Worth employer (a small hospital) were required to have household incomes at or less than 200 percent of the poverty level. Some earned wages above \$11.00 per hour, but all lived in low-income households, taking into account total income and number of household members. In contrast, all the WASC participants who enrolled at subsequent employers earned \$11.00 or less per hour, yet they lived in households with incomes at more than twice the poverty level — sometimes, a great deal more. Despite fairly low wages — on average, \$9.17 per hour — almost no participants lived in poor families: 37 percent reported household income from a current spouse or partner; 96 percent had family incomes above 200 percent of the federal poverty guideline; and 98 percent had family incomes above 130 percent of the federal poverty guideline.

Not surprisingly, therefore, the appendix table shows that almost no participants reported already receiving food stamps, child care subsidies, or other types of assistance at the time that they enrolled in WASC. However, of the 54 percent who reported having health care coverage for their children, nearly half indicated that it was publicly funded coverage. About two-thirds of participants had health care coverage for themselves, although a full 98 percent reported that their employer offered a health plan. Less than half reported being enrolled in an employer-provided plan. This suggests that many employees had opted out of their employer-sponsored plan and sought out other options (particularly for their children's coverage), presumably because of the high cost of employees' share of premiums required for employer-sponsored coverage.

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<sup>33</sup>This change was implemented in early 2007, beginning with the second of the five Fort Worth employers where random assignment was conducted. The change was prompted by WASC recruitment experiences at the first Fort Worth employer (a small hospital) and in employer-based recruitment that had been conducted at the San Diego WASC demonstration site. In both of those settings, a number of low-wage employees just missed the family income cutoff of 200 percent of the federal poverty level.

<sup>34</sup>Although WASC applicants were no longer required to document their household income, this information was still collected for research purposes.

The population of employees at the logistics company was distinct from the populations at the other employers, in a few key respects. For example, 79 percent of them had a high school diploma, a General Educational Development (GED) certificate, or higher education, whereas this figure at the other companies was far lower, averaging only 37 percent. Job tenure was far lower at the logistics firm — averaging less than a year, compared with at least two years at the other employers.

Appendix Table A.1 also shows that many Fort Worth WASC participants had limited English language skills. Indeed, at the time that they enrolled in WASC, 10 percent of all participants were already taking some kind of course in English language instruction. Overall, at enrollment, 38 percent indicated that they did not speak English well or at all, and nearly two-thirds were born outside the United States. At the logistics firm, however, 84 percent of participants reported speaking English well or very well, although more than half were born outside the United States. Because the logistics firm was the last, chronologically, to receive WASC services, the package of services — particularly, the English language component — may have been somewhat better tailored for employees at the preceding firms.

Table 2 shows that, on several dimensions of demographic and human capital characteristics, Fort Worth participants were more disadvantaged than average American low-wage workers. The table compares selected characteristics of the Fort Worth WASC participants and a nationally representative sample of U.S. workers who had hourly wages below \$15 and family incomes less than 200 percent of poverty.<sup>35</sup> Women, older, foreign-born, and Hispanic workers often obtain lower wages and slower-than-average wage growth, and each of these groups is overrepresented among the Fort Worth participants. Also in comparison with the U.S. low-wage worker group, Fort Worth participants had higher educational attainment; were less likely to have children; and earned more per hour, on average.

In several other respects, however, the Fort Worth participants were slightly more advantaged than average U.S. low-wage workers. They were more likely to be married and living with a spouse, to be working full time, and to have medical coverage — all factors limiting the potential for WASC-targeted work supports to bring value to the participants in Fort Worth (either because they did not qualify or because they simply did not need those supports). Overall, therefore, the characteristics of Fort Worth WASC enrollees suggest that the *advancement* components of the WASC service package — training in English language and computer skills, and individual coaching designed to get participants thinking strategically about their career options — may in fact have been a good fit for the population that Fort Worth was able to reach through employers.

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<sup>35</sup>U.S. Bureau of the Census (2005).

## The Work Advancement and Support Center Demonstration

### Table 2

#### Selected Characteristics of the WASC Research Sample in Fort Worth and a National Sample of Low-Wage Workers

Characteristic	Fort Worth	United States
Gender (%)		
Female	75.0	54.0
Average age (years)	40.5	34.5
Race/ethnicity (%)		
Hispanic	35.4	28.8
White	7.2	46.9
Black	22.0	19.1
Other	35.4	5.1
Citizenship (%)		
Born in United States	35.1	72.9
Marital status (%)		
Single, never married	34.1	43.5
Married and living with spouse	43.3	32.3
Has children (%)	50.0	56.2
Has high school diploma, GED certificate, or higher degree (%)	62.2	40.1
Is working full time (35 or more hours per week) (%)	84.8	74.4
Average hourly wage (\$)	9.17	9.00
Sample member has medical coverage (%)	66.0	59.3
Employer-provided or other private health plan	64.6	15.6
Publicly funded coverage	1.9	47.3
Sample size	209	1,820

SOURCES: MDRC calculations from WASC Baseline Information Form and March 2005 Current Population Survey (U.S. Bureau of the Census, 2005).

NOTES: Sample sizes vary because of missing values.

Fort Worth sample members were enrolled from November 2006 through May 2008.

Low-wage workers for the U.S. sample are defined as individuals working at the time of the survey, aged 18 to 62, earning less than \$15 per hour, and with a family income of less than 200 percent of the federal poverty level.

## **WASC Service Delivery in a Workplace Setting**

Adapting WASC’s service model for delivery in the workplace meant contending with sometimes complex logistics — arranging suitable times and places to deliver training and coaching and finding creative ways to sustain participation by employees who had tight schedules both on and off the job. The model also meant that the content of WASC services had to be customized to fit each workplace and each employee.

### **Group Skills Training**

Because group training provided a fairly straightforward, structured service that was responsive to the interests of both employers and employees, it was often offered as one of the first components — sometimes, the primary component — of Fort Worth’s WASC services. Arranging the details of a training course (signing up, scheduling, the pace and content of the first few courses, attendance) provided coaches, employers, and employees with shared objectives from which to build rapport, before moving conversations to more subjective and potentially sensitive issues, such as employers’ advancement policies and employees’ advancement goals.

WASC-sponsored group training was offered on-site at most of the workplaces participating in the project. Classes typically were scheduled from one to two hours, several days per week, for a span of three to five weeks, during employee release time paid for by the employers. Classes were held in sections of six to twenty students.

The content of the WASC training offered at each workplace is summarized above, in Table 1. Although the Fort Worth team tried to customize the offerings as much as possible, the team in several employer sites arrived at a model that included vocational English as a Second Language (VESL) and basic computer skills, with instruction being provided by faculty from local community colleges. Once the WASC team learned to tailor these basic skills curricula to specific workplaces, they continued to offer similar, partly customized classes to employers that subsequently were recruited into the project.

### ***Basic Skills Course Content***

The VESL classes differed from traditional ESL classes in that they focused on work- and workplace-specific vocabulary, phrases, and learning exercises. Course activities were tied to everyday workplace activities. Working with employers and WASC staff, community college instructors interviewed supervisors to incorporate common day-to-day workplace phrases and company safety and production policies into the course content. They took photographs throughout the work site to illustrate common tasks. In some cases, students were divided into small groups for hands-on assignments — for example, to photograph specific work stations using digital cameras that were provided, to discuss new English language



phrases and vocabulary that were used in everyday job tasks, and to illustrate acceptable performance of work protocols.

English language training was particularly valued by Spanish-speaking employees at the Longhorn Hotel (a pseudonym), where being able to communicate well with hotel guests was considered essential to advancing. Participants reported that they valued the content and teaching style of the courses, and several mentioned that the skills that they learned in class paid off immediately on the job. Some Longhorn Hotel participants emphasized how strongly they appreciated the VESL classes and reported having previously being inhibited by limited English skills in their interactions with supervisors and hotel guests. Several mentioned that they liked the pace and teaching style of the course and small-group discussion activities. They especially appreciated the opportunity to practice typical workplace encounters in a low-pressure setting. Several described feeling increased confidence interacting in English with guests and other staff members:

[The instructors] went slower; they explained things very well; and they helped us understand them. We were afraid that we would feel ashamed if we didn't understand. We expected that others might make fun of us. But the instructor said, "It doesn't matter if you make a mistake," and she corrected us. So that was very important.

— Longhorn Hotel VESL Participant

She is dedicated and patiently explains things to you. It's like therapy. You develop little by little.

— Longhorn Hotel VESL Participant

Unlike the VESL classes, the basic computer skills courses were not customized. However, the employers who requested computer training believed that employees who completed it would become more adept at using the software programs that were being used routinely in the workplace. In some cases, this meant teaching basic computer literacy; some employees were unfamiliar with operating standard computer hardware (such as a mouse) or navigating through Windows-style menus and commands.

WASC curriculum development at the logistics firm Refurbish, Inc. (also a pseudonym), illustrates some of the limitations of Fort Worth's approach to employer-based training. Initially, managers at the company were interested in upgrading a large number of semi-skilled workers to a higher-level skill certification; many employees were interested in obtaining these higher-level certifications. However, for competitive and strategic reasons (including a desire not to share with outside instructors the kind of detailed, proprietary information about technical work processes that would be part of the upgrade training), Refurbish ultimately decided to implement those upgrades slowly, in small groups of four to six trainees, using its internal training staff — not in large groups via WASC. Nevertheless, the WASC project

wanted to be able to offer training to all its participants, so the WASC team offered both VESL and basic computer skills training.

Because Refurbish employees had hoped that they would have an opportunity for technical training instead of (or in addition to) basic skills training, the content of the English language course amounted to less than they had hoped for; their feedback about the course was generally positive, but they would have preferred to receive more technical skills. In contrast, participants spoke more highly of the computer skills class. Several reported that some of the spreadsheet training that they had received could be applied immediately to their work with the company's software, which was similar to Microsoft's Excel:

We use spreadsheets in the ["Express-by-Mail" division] cage, and I was having a lot of difficulty figuring out how to handle dates, formatting, and such. So this helped me out a lot.

— Refurbish Participant

Because participants entered the class with varied levels of basic computer proficiency, Fort Worth instructors found it a challenge to write and deliver a curriculum that would be valuable for all the students — covering work-relevant material and sufficiently advanced content without moving too quickly for less experienced students. Both more experienced and less experienced students reported that the instructor paced the course appropriately, providing patient and thorough explanation and illustration. One participant, who had had almost no prior computer experience, commented that she had been proud to show the course completion certificate to her son and had purchased a home computer to continue developing skills with the goal of becoming an office manager.

### *Participation*

A clear advantage of offering WASC training on-site with paid release time is that attendance and completion rates were high: across all sites, just over 150 employees took part in WASC group training, and nearly 90 percent of them completed the training. Human resource managers worked with frontline supervisors to provide substitute coverage for employees in training and to ensure that employees met their individual job responsibilities as a precondition of training. Few individuals dropped out of classes once they began. In at least one site, instructors arranged a makeup session for those who missed important classes in the sequence.

Participants explained that the paid release time and encouragement from their supervisors made this opportunity much more feasible than training elsewhere. Employees were impressed by the release-time arrangement, which they understood meant that employers were essentially paying for employees' time twice — once to pay the wages of the training participant and a second time to pay another employee to cover the responsibilities of the person who was in class. In addition, several respondents from each site appreciated the ways in which their

supervisors encouraged them to attend the class, even when it meant working harder to meet workplace demands during the class time:

Our supervisors were also motivational. When there was a lot of work, I felt bad leaving, but my boss would say: “Don’t worry about it. Go to class.”  
— Longhorn Hotel VESL Participant

In one of the employer sites, training of entry-level workers was followed by training for frontline supervisors. Managers at the company believed that training both entry-level workers and their supervisors helped to boost teamwork and morale.

### **Individual Job and Career Coaching**

Fort Worth’s WASC program offered individual job and career coaching to all participants. The coaching ranged from quick check-ins to substantive advancement planning. In most of the employer sites, employees met their career coach when they first enrolled in WASC, and they continued to meet periodically, usually at their workplace, for approximately one year.

#### *Times and Places for Coaching*

In setting the time, place, and duration of subsequent individual meetings, the coaches responded to conditions in each employer site. In job sites where employees’ time was tightly regulated by production, and during busy periods, the coaches tried to let participants know when they would be available for brief, in-person meetings during employee breaks — in some cases, followed by longer phone conversations during hours outside work. During slower work times, particularly at the WASC health care and hospitality sites, coaches were able to schedule advancement planning sessions of 15 to 30 minutes with individual employees without disrupting work:

We have to meet at their convenience, and what their convenience is, most of the time, is their lunch break at work. . . . I would see them individually, and I would talk with them. I’d stay anywhere from 10 to 15 minutes, sit down with a pen.  
— Fort Worth WASC Career Coach

It could be difficult for coaches and participants to find adequate privacy and time to conduct more than brief conversations about participants’ employment goals. For this reason, coaches also made themselves available, during a wide range of hours, to meet participants outside the job site — by telephone or at alternate meeting locations, such as nearby One-Stop Career Centers. Even so, most WASC coaching discussions took place within the constraints dictated by each workplace setting.

Coaches typically met individually with participants every week or two during the initial group training period at each employer; thereafter, they met about every four to six weeks

with active participants. Depending on the employer location, between one-half and two-thirds of participants met at least monthly with a coach throughout the one-year period following enrollment in WASC. During most of the WASC project, Fort Worth coaches had small caseloads of 20 to 30 participants and thus were generally available to meet as often as requested (despite the sometimes long driving distances between the WASC employer locations).<sup>36</sup> However, at the project's peak of participant enrollment — during implementation at Refurbish, Inc. — caseloads rose to more than 70 participants per coach.

### *Content of Coaching*

Fort Worth's on-site coaches met regularly with WASC participants to plan their career goals, identify short-term and long-term steps that they could take to advance, and provide information and feedback such on topics as the structure and distribution of job classifications at their employer, paths for advancing, managing work relationships with supervisors and co-workers, job performance, balancing work and family, and other topics identified by WASC participants. For some participants, coaching meetings focused primarily on building and updating their career plan. Other participants preferred less structured meetings in which they could strategize about how to apply for a particular internal opportunity for promotion or how to tap into internal and external opportunities to build skills and credentials. Some participants asked their coaches to help them troubleshoot problems that they were having on the job or problems outside work that threatened their job performance.

**An intermediary role.** In each workplace, coaches also met with human resources staff and other managers to understand the employer's formal and informal advancement policies, with the goal of helping to communicate them to employees. Coaches worked to secure recognition and trust from both managers and employees; as third parties who understood the specific needs and challenges of the workplace, they could offer appropriate suggestions to employees and managers alike. In some workplaces, WASC coaches built considerable rapport with human resource officers, spent long hours at the facility, regularly read job postings and job descriptions, and tried to learn as much as they could about the nature of the work and about the employer's formal and informal advancement processes.

For example, the first WASC career coach who was assigned to Refurbish, the logistics and cell phone repair firm, brought personal career experience in electronics. This enabled him to quickly understand the specific skills required of each position and to build credibility with the company's employees and managers as someone who understood the nature of the work. Management allowed him to set up a cubicle on the otherwise-restricted production floor — just

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<sup>36</sup>When WASC activity and caseloads were low, Fort Worth staff divided their time between WASC and other workforce development projects.

outside the on-site classroom — where he kept regular office hours and checked in informally with employees before and after class. Building on this considerable degree of access to the workings of the company, he learned as much as he could from human resource staff about what it takes to move from a Level I to a Level II Technician position, who qualifies for employer-provided upgrade training, in-house training opportunities and how often they are offered, and how advancement opportunities are posted.

Similarly, the career coach at the Longhorn Hotel built close working relationships with directors in human resources and training, thoroughly investigated corporate advancement policies, and regularly made suggestions to participants about ways that they might position themselves to move up. Some participants were reluctant to use the computer resources where Longhorn Hotel posted its advancement opportunities, either because they lacked good computer skills or because they did not feel confident about applying for an open position. The career coach regularly reviewed the postings with and for them, encouraging them to take a chance on opportunities in other departments (a useful advancement strategy at the hotel).

**Contending with limited internal advancement opportunities.** Fort Worth WASC staff, employers, and some employees recognized an inherent potential conflict in convincing employers to take part in a project aimed at advancing low-wage workers, when the companies were not able to promote all employees (or even the majority of employees) who participated. The employers did not want to make promises that could not be honored and did not want to lose employees who might increase their skills but have no room to advance — and therefore might seek advancement at another company. These concerns were not trivial. Even after participating in WASC-sponsored training, some employees discussed their frustrations with the limited number of advancement opportunities offered at their companies. In research interviews, some commented openly that they felt unappreciated or inadequately compensated for their work and emphasized that they found it valuable to discuss with a coach some of their frustrations and uncertainties about compensation and advancement.

Although career coaches avoided encouraging employees to look for work at a different employer, they tried to help employees frame decisions about career moves. If an employee quit or was fired from the initial job, the coach offered rapid reemployment counseling. However, coaching employees to leave WASC-participating employers would have compromised the program's commitment to employers. Therefore, coaches were more restrained when it came to advising employees who wanted to quit. In such situations, coaches had to preserve both the confidence that the employee had shared with the coach and the trust that the employer had placed in the WASC program.

The project took three steps to resolve this tension:

- First, Fort Worth WASC tried to recruit employers that offered full-time work with benefits and a real pool of potential advancement opportunities for entry-level employees.
- Second, when employees wanted to vent about the strains of holding work and family responsibilities in good balance or about workplace strains common to many jobs, the coaches tried to provide clear, behavioral resolution strategies and encouraged the employees to persevere. Generally, WASC coaches encouraged employees to stick with their current employer until they could find ways to move up internally.
- Third, for employees who had reached more decisive job-change junctures, coaches helped frame job-choice decisions, identifying elements of the current job that offered more versus less satisfaction, leaving employees to make the decision, and encouraging them to keep in touch as they did.

The coaches tried to help employers and employees derive greater value from their existing employment relationship, by focusing on clarifying common interests in the short term. At the same time, knowing that not every employee would remain with the current employer forever, coaches hoped that their activities would also help both employers and employees clarify their self-interests and goals for the long term.

**Nudging participants to take internal advancement opportunities.** Another challenge for WASC coaches was that even when advancement opportunities did open up within a current employer, participants did not necessarily want to take them, given trade-offs that they were aware would come with the new job. For example, one coach worked with a participant who had been relocated in the wake of Hurricane Katrina and who found herself acutely overextended by the combination of caregiving responsibilities for her extended family and the demands of a short-order cooking job at a hotel. When the employee learned about a still more challenging job opening — a position as a head breakfast chef — she hesitated to apply, recognizing the increased demands and the new work schedule that would come with the position. The career coach encouraged her to reconsider:

I told her to go ahead and give it a try. . . . She had had so many bad things happen to her that it was like she was looking for disappointment. . . . I try to talk to people to make them feel comfortable and realize that not everything is just straight black and white, either this or that. Sometimes if you take a chance in life, something good can come of it either way you go. Once she heard herself saying that she wanted the promotion, she wanted to take the chance, she did it.

— Fort Worth WASC Career Coach

In another site, human resources staff and WASC staff provided training to prepare employees to take on supervisory positions at the current employer, only to discover that the workers had their own reasons for not wanting to take on the supervisory jobs. In this case, the trade-off for employees would have been a less desirable shift schedule and disruption of their child care arrangements. Despite encouragement from WASC coaches to consider taking the supervisor positions, employees valued their work schedule more than the wage increase that would have come with a promotion.

In two of the employer sites, participants who were interviewed valued the encouragement and the occasional nudging that were provided by the WASC career coaches. The coaches were bilingual in English and Spanish, which helped them build rapport with Spanish-speaking employees who might benefit from on-site VESL classes. Given the insecurities that some participants expressed about whether the class would offer a safe environment to honestly try their English conversational skills (and perhaps be embarrassed or fail), it was essential that they could discuss these concerns with career coaches in their first language:

My coach is always coming by. She insists that we apply for advancement opportunities. She's always telling us that. She even goes to the computer herself and she tells us: "This position is available. Do you want to get it?"

— Longhorn Hotel VESL Participant

### **Work Support Screening and Application Assistance**

The Fort Worth WASC program sought to connect employees to financial resources that could increase their total income and help pay for work-related expenses, such as child care and transportation. Connecting low-wage workers to financial work supports was one of the major objectives of the WASC demonstration. Bringing a connection to these supports *into the workplace* was an important aspect of the WASC program in Fort Worth. The program screened participants to see whether they would be eligible for subsidized health care and child care, food stamps (the Supplemental Nutrition Assistance Program, or SNAP), the Earned Income Tax Credit (EITC), and the Child Tax Credit (CTC).<sup>37</sup>

Unfortunately, despite their low hourly wages, most Fort Worth WASC participants had family incomes above the eligibility cutoffs for several of the supports — notably, food stamps, Medicaid, and the State Children's Health Insurance Program (SCHIP). Because of this (and, secondarily, because of challenges associated with the local policy environment, the WASC program design, and the service delivery constraints inherent to the workplace setting), the work support component of the Fort Worth WASC program had limited reach.

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<sup>37</sup>The EITC and CTC are written into the tax code and can supplement the earnings of low- and moderate-income working families.

### *WASC Work Support Services Within a Public System in Flux*

Fort Worth's WASC project was implemented while the State of Texas was beginning to test new ways for residents to apply for and receive social welfare benefits, including WASC-targeted work supports. The state's planned introduction of centralized call centers to process benefit applications — and some of the unexpected difficulties that the state encountered while trying to implement its plan — had a direct effect on the implementation of work support screening in the WASC program. Although the plan for the call center was eventually scaled back and was never, in fact, implemented as it was envisioned in the Fort Worth area, it influenced the work support component of the Fort Worth WASC project in two important ways:<sup>38</sup>

- In light of the state's plan, the local WASC planning team and MDRC had agreed to implement WASC in Fort Worth without direct involvement by the HHSC and *without including benefit eligibility workers on the WASC team*. The rationale for this design decision was that the Fort Worth program would leverage the capacity of the call centers to facilitate applications by WASC participants who appeared to be eligible. WASC coaches were limited to the authority, expertise, and tools available to workforce development staff and, therefore, could not definitively tell participants whether they would be eligible to receive food stamps, Medicaid, and SCHIP. WASC coaches also had limited ability to help troubleshoot applications, initiate appeals, or try to reopen closed cases on behalf of participants. These constraints limited the extent to which the WASC program could effectively connect participants to work supports.
- The implementation timetable for the state's plan shifted several times, making it hard for the WASC team to plan ahead; it was unclear whether and when benefit application processes would be changing. Meanwhile, WASC's implementation coincided with a decrease in the total staffing of the HHSC as well as understaffing in some state-run eligibility offices — making it difficult for WASC staff to gauge the quality of service delivery that participants could anticipate receiving at a given HHSC office.<sup>39</sup>

Arguably, under such conditions, a knowledgeable career coach would be a valuable guide, for example, to help applicants find their way through a potentially confusing service system. Indeed, part of the WASC coaches' role became one of helping participants navigate a

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<sup>38</sup>In 2007, the Texas Health and Human Services Commission (HHSC) announced that it would further slow — although not eliminate — its plans for continued use of call centers.

<sup>39</sup>For a discussion of HHSC understaffing during the initial implementation of the new system, see Center for Public Policy Priorities (2006).



public system that appeared to be suffering from diminished capacity. Fort Worth WASC managers described the program’s role in helping to direct participants to use those HHSC offices that were perceived to have a better reputation for customer service. Overall, however, the WASC staff reported that benefits application became increasingly difficult to navigate — both for them and for WASC participants. Because of the timing of (and uncertainty about) the changes within the public system, it was hard for the WASC program to keep up to date and sustain its own capacity to effectively assist with work support applications, while simultaneously focusing on delivering training and career coaching services.

### *Work Supports and the Workplace Setting*

As was the case with WASC job and career coaching, finding enough privacy and time to discuss work supports was sometimes difficult. WASC employer sites were not ideal places for holding one-on-one, confidential meetings between coaches and participants. Without a private place to meet, a coach could not help an employee apply for assistance programs without the danger that coworkers or supervisors might overhear the conversation. Because work support eligibility and application processes could be complex and time-consuming, a further limitation was the often-sporadic and brief amount of free time that employees had available. For these reasons, if a WASC participant showed a need for, and interest in, receiving work supports, the coach would typically follow up with a phone conversation, either before or after the participant’s work hours. In addition, sometimes coaches would meet with a participant off-site (for example, at the nearest One-Stop Career Center) to help prepare applications.

Despite these accommodations, and despite assurances of confidentiality, many participants chose not to apply for work supports, even if they appeared to be eligible. In some cases, participants simply did not want or need the support that was being offered. This was particularly true with child care subsidies — one of the few supports for which many Fort Worth WASC participants were eligible — in which signing up for a subsidy could mean disrupting existing child care arrangements with family members or other unlicensed providers.<sup>40</sup> Other participants may simply have felt uncomfortable discussing work supports with coaches, given that the WASC program staff appeared to have close ties to supervisors and managers at the company.

Fort Worth WASC staff and employer interviews suggest that, within participating employers, some managers themselves held ambivalent views about work supports — particularly food stamps and, sometimes, subsidized health insurance. While managers recognized that even full-time employees can have difficulty making ends meet and that financial struggles and

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<sup>40</sup>Such child care arrangements often are paid in cash or barter and can be difficult to link with subsidy programs — for example, because of the need for work eligibility, a criminal background check, and income tax withholding on the part of the provider.

work-life conflicts can hurt employees' job retention, attendance, and performance, they were reluctant to discuss such issues directly with their employees. Being able to have coaches address these issues was attractive to the employers. WASC offered an opportunity to address some of these issues, without employers' having to get too close to them. In this respect, by offering a light form of "case management" and assistance with certain employee problems outside the workplace, WASC offered a service that was somewhat similar to the confidential counseling offered by many employee assistance programs (EAPs).<sup>41</sup> According to Fort Worth staff, some managers said expressly that they did not want any feedback about the content or scope of financial or personal problems that were addressed by coaches.

### *Screening, Eligibility, and Take-Up of Work Supports in WASC*

Eligibility for public work supports often is governed by complex rules. To screen for potential eligibility, Fort Worth's WASC staff used a variety of screening tools, including a "Work Advancement Calculator" that was designed specifically for the WASC demonstration.<sup>42</sup> In practice, however, the coaches were not always confident about the level of accuracy provided by the screening tools, which were neither as thorough nor as accurate as the eligibility determination systems used by HHSC. Fort Worth coaches had no access to these systems and could not definitively determine whether a participant would be eligible for supports or how much they would receive. Despite taking part in interagency work support eligibility training offered by HHSC and using the best estimations that they had available to them, the WASC coaches could not always advise participants clearly on whether they were likely to be eligible. This was an important limitation of the Fort Worth program.

Work support eligibility screening was usually conducted not in person with a participant but at the WASC "back office" — without the participant's being present — using income and family information that had been previously provided by the employee. While this helped save time during workplace-based individual coaching sessions, minimizing disruption to employer and employee, it unfortunately meant that coaching sessions did not often explore or quantify the difference in total income that work supports could make. It also meant that WASC

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<sup>41</sup>A key difference between WASC and an EAP is that the package of WASC services included some, such as training, that the employer itself hosted or helped deliver. As a result, the WASC program presented itself to employees as a hybrid of an employer-led initiative and an outside service.

<sup>42</sup>The WASC Work Advancement Calculator — which helps staff connect participants to work supports and other programs or benefits when their circumstances change — is based in part on an earlier benefits estimator entitled "Oregon Helps," developed for Multnomah County, Oregon. WASC's calculator was also intended to support participant-coach conversations about how changes in earnings might affect total income. It was rarely used for this purpose in Fort Worth. However, staff cited several examples in which they were able to connect participants to work supports and other programs or benefits when the participants' family circumstances or income changed. For a detailed description of the WASC Work Advancement Calculator, see Tessler and Seith (2007).

coaches could not usually help participants understand and plan for the differences in earnings and income that they could anticipate by making specific job advancement moves.<sup>43</sup>

Despite these inherent constraints in the Fort Worth WASC design, coaches actively encouraged employees to apply for work supports — particularly if it appeared that they might be eligible for food stamps, Medicaid, or SCHIP:

I say, “It’s not going to hurt.” A lot of [applications lead to a benefit amount of] \$10.00 — that’s the lowest that they can give you. [But] if you’ve got four kids, you’re a single parent, and you’re making \$7.00 an hour, \$8.00, you’re going to qualify for food stamps. A lot of people don’t want to apply for food stamps. . . . Some of them look at it as a disgrace: “I’m not that bad off,” or “If I weren’t working, I’d apply.” But then you can look at them and say: “Hey, you know the kids are going to be at home in the summer. You might qualify for food stamps, and the money that you’ll save on food . . . you’ll get to spend the extra money at Christmas. You might even start a savings account, checking account.”

— Fort Worth WASC Career Coach

WASC coaches provided participants with all necessary application forms, and they sometimes helped fill out the forms. Coaches were also able to explain in detail the types of documentation that participants would need to furnish as part of the application process — with the goal of reducing the number of trips that participants would need to make to HHSC offices. For those applying for food stamps, coaches provided advice on how to request a waiver of the required face-to-face application interview — that is, to instead conduct the interview by telephone. In practice, however, few participants actually asked for and obtained permission from HHSC to have this requirement waived.<sup>44</sup> Occasionally, WASC coaches were able to help participants “troubleshoot” an application that was initially denied by HHSC due to eligibility documentation issues.

The WASC team also conducted seasonal outreach for particular work supports. For example, during and just prior to tax season, in each participant meeting, coaches discussed the availability of free tax preparation services offered within the community, as well as the tax credits for which each participant appeared to be eligible. This outreach to WASC participants during tax season also placed an emphasis on avoiding high-interest “refund anticipation loans.” To illustrate that such loans offer a bad deal, WASC staff prepared humorous flyers — for example, depicting an Old West holdup in progress, with the tagline: “Want to get your refund early? Give me \$300.” Coaches discussed with participants the hidden costs of accepting refund anticipation loans, and they translated those costs into tangible terms, such as “worth four days’

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<sup>43</sup>This type of income planning is described in Tessler and Seith (2007).

<sup>44</sup>Some states and localities routinely waive this requirement for applicants who work at their jobs during welfare agency office hours. This was not the case in Fort Worth.

pay.” For participants who had bank accounts, coaches also provided information about free electronic deposit options offered through tax preparation software programs and Internal Revenue Service (IRS) e-filing.

Other work supports were promoted seasonally as well. For example, during the months when schoolchildren would not have access to free or reduced-price lunch, staff in two employer sites where participants appeared potentially eligible for food stamps used flyers to spread the word about the opportunity for families with children to obtain food stamps and community-based food resources. Other seasonal campaigns emphasized additional low- or no-cost services that would be attractive to participants who were parents, such as free school supplies and uniforms for children each August.

Inasmuch as 85 percent of Fort Worth WASC participants were working full time and 37 percent had spouses or partners who also contributed to household income (Appendix Table A.1), most appeared to be ineligible for public health insurance or food stamp benefits. Like many case managers, coaches needed to make decisions on their feet about how much time and effort to invest in work support eligibility screening versus advancement coaching. In the end, they reported mentioning work supports with most participants but pursuing eligibility screening and applications only with those who seemed interested and likely to be eligible.

**Health insurance and food assistance.** For reasons discussed above, most participants’ combined household or family earnings put them over the income eligibility limits for health insurance and food assistance. Many participants indicated that the premiums and deductibles of their employer-provided insurance plans seemed prohibitively expensive and left them with difficult choices about what level of coverage to purchase and for which family members. Therefore, of all the work supports offered by WASC, participants were most interested in health insurance. A small number were eligible for Medicaid or SCHIP for their children, and they received help in applying from WASC staff. Almost no participants, however, qualified for Medicaid for themselves.<sup>45</sup>

**Subsidized child care and transportation.** These supports were administered by Workforce Solutions for Tarrant County, the workforce investment board (WIB) for Greater Fort Worth, making it possible for WASC participants to have priority access to subsidized child care slots. As a result, nearly all WASC participants with young children were eligible for child care assistance. In addition, like other WASC sites, Fort Worth was able to supplement the

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<sup>45</sup>Medicaid eligibility cutoffs in Texas were at 185 percent of the federal poverty level for pregnant women and infants, 133 percent for children ages 1 through 5, and 100 percent for children ages 6 through 18. SCHIP eligibility continues through 200 percent. Very few adults are eligible for Medicaid in Texas. (Eligible adults include recipients of Supplemental Security Income [SSI] and Long Term Care, TANF parents with no earnings, and working parents up to 21 percent of the poverty line.)

core package of WASC supports with additional assistance for short-term and emergency transportation assistance offered by the workforce board. However, employee interest in these two supports was very low. Staff reported that most employed low-wage workers had already secured stable, albeit often-unlicensed child care arrangements. Within some sites, participants may have had less need for child care and transportation assistance (and perhaps other work supports) because they had existing networks of support; in at least two employer sites, coworkers included friends and family members. Also, paid release time for WASC training meant that many employees did not need to make special arrangements for child care and transportation in order to participate; those who were worried about these issues may have chosen not to come forward to enroll in WASC in the first place.

**The Earned Income Tax Credit (EITC) and Child Tax Credit (CTC).** Fort Worth conducted two tax-season outreach efforts to WASC participants, from late 2006 through early 2007 and again from late 2007 through early 2008. This included distributing flyers, informing participants of the value of claiming these credits, and notifying them of the location of Volunteer Income Tax Assistance (VITA) sites where they could receive free tax preparation. Fort Worth offered WASC participants a tax-season “lottery,” whereby participants who submitted proof that they had filed their tax return were entered into a drawing for a large retail gift card. Use of free tax preparation entitled a participant to an additional chance at the gift card. In each tax season, just over half of WASC participants furnished their coaches with evidence that they had filed a return. In addition, during individual meetings with coaches, nearly all other participants also reported having filed their taxes. However, many participants did not recall whether or not they had specifically received the EITC or CTC — likely because most participants did not prepare their own tax returns. Most participants told their coaches that they received free tax preparation services or used paid tax preparers. At the time of enrollment in WASC, nearly all participants had reported having filed a tax return in the previous year, but only two-thirds were aware of the existence of the EITC, and less than one-third were aware of the CTC.

In sum, because of limited eligibility and interest among the WASC participants and because WASC staff did not have the authority to officially submit work support applications for participants, the work support component of Fort Worth’s program showed the weakest participation. However, for a small number of participants — including those with very low incomes and those who lost their jobs (or who had a family member lose employment) during the course of the WASC program — supports such as food stamps may have stabilized their incomes. Therefore, although work support assistance was not frequently used by Fort Worth participants, the career coaches believed that being able to offer advice and referrals to work supports was an important part of their coaching portfolio.

## Conclusion

The Fort Worth WASC program was among the first structured attempts by the public workforce development system to deliver programming that incorporated the following elements simultaneously: focusing on currently working people, focusing on advancement, and bringing advancement services and work supports into the workplace.

### Strengths and Limitations of the WASC Employer-Based Model

WASC's employer-based approach had clear strengths:

- **By using flexible streams of funding, Fort Worth was able to target a working population and customize services that incorporated WASC's core strategies and were generally compatible with the workplace setting.** For the most part, employers and employees reported high satisfaction with the services provided by the WASC program, and they indicated that they would invest the time and other resources needed to participate again, if given the opportunity. On-site delivery of WASC training and coaching made it convenient for many employees to participate and may have made it possible for the workforce development system to gain access to workers who otherwise would not have come into contact with the One-Stop Career Center system.
- **Employees noticed that their employers had invested time and other resources in making WASC services available; employer endorsement of the program may have lent it legitimacy in employees' eyes.** Moreover, by spending considerable time with a company's employees, supervisors, and managers, WASC coaches became familiar with workplace-specific advancement paths, company policies, and human resource policies — and were able to incorporate this information into coaching sessions with participants.
- **In some sites, employers showed increased capacity and commitment to the training of entry-level workers, even after WASC services ended.** Standard basic skills curricula were customized to particular workplaces, although not perhaps to the greatest degree that might have been possible with a larger investment of time and resources.

WASC's employer-based approach also had important limitations:

- **The Fort Worth staff sometimes found it difficult to balance service obligations to both employees and employers — to treat both as clients**

— **when their respective interests did not fully overlap.** Importantly, the number of advancement opportunities available within a company were usually far fewer than the number of employees seeking to move up. Employers were understandably reluctant to generate widespread expectations for advancement, and, as a result, some declined to participate in the project.

- **The training was limited, and employers had concerns about their ability to promote trainees or the possibility that trainees might seek employment elsewhere.** This related problem had serious implications for the career advancement prospects of participants. Although all of the WASC-sponsored training classes incorporated workplace-specific content that the participating employers valued, the training did not lead to portable skill certifications or other industry-recognized credentials for the employees who completed the classes. Indeed, one employer requested that the WASC training curriculum be made less technical than was originally planned. This employer was reluctant to allow outside (community college) instructors to learn too many proprietary details about the employer's work processes and was equally reluctant to train more employees than it could promote internally. The employer reasonably feared that the newly trained employees might leave the company for jobs at competing companies.
- **While offering services in the workplace meant that employees did not (usually) have to travel to off-site locations to meet with WASC staff, the workplace setting did not always allow sufficient time and privacy to accommodate individual coaching and work support assistance.** This was less of a limitation in some workplaces than in others; for example, hotel settings were inherently better able to accommodate individual coaching than were manufacturing facilities. Nevertheless, finding time to meet could be a challenge even within workplaces where work flow was flexible; some employees simply found it difficult to step away from their duties during paid work hours or were reluctant to use their limited break times to meet with a coach. In some workplaces, barely more than half of Fort Worth participants met at least monthly with a coach.
- **Most of the low-wage workers recruited by Fort Worth turned out to be ineligible for key work supports, such as food stamps and subsidized health insurance.** This is a fundamental problem in conducting work support outreach through employers: employers do not know the total fami-

ly incomes of their workers, and many low-wage workers live in households that are not low-income.

- **To develop and implement services in each new employer site in Fort Worth required considerable effort and was costly** — taking into account the costs of conducting intensive employee recruitment, meeting periodically with each individual employee who enrolled, customizing the curricula to each workplace, and sometimes traveling long distances to be on-site throughout the service delivery period. Although these costs may not have been excessive compared with operating WASC in a One-Stop setting (that is, as in the other three WASC demonstration sites), it did exceed what was typically offered through workforce system-funded training services to employers. It is unclear whether Fort Worth's WASC model could be replicated at a larger scale.

### **Considerations for Implementing Similar Models**

The experience of implementing the employer-based version of WASC in Fort Worth raises several questions about the overall value of the program to employers and employees, about whether it would be desirable and feasible to pursue an employer-based model for delivering these services to this population, and about whether public workforce development systems are in a good position to do that. The following key challenges would need to be addressed in order for a similar model to be offered at a larger scale.

**Advancement focus and prospects for advancement within the same firm.** Fort Worth's program was unable to resolve a fundamental challenge of implementing advancement-focused services in the workplace. As discussed throughout this report, many employers simply do not have a large number of promotional, second-tier, or career-building opportunities for entry-level workers, although incremental wage increases are available. In such settings, training and coaching that focuses on individual worker advancement simply may not make sense, unless employers explicitly agree to — and have strong business reasons to — function as a temporary station for workers who are headed for more advanced positions in other firms or industries. For these firms, a retention focus — rather than an advancement focus — may make more sense; increasing employee retention, even if for just a few months, may save employers money.

Also, unless employers can hand-select advancement candidates to participate in vocational skills training, the training content for incumbent, entry-level workers is likely to gravitate



toward basic skills and toward enhanced performance of current duties.<sup>46</sup> WASC employers were willing to incorporate some advanced skills (and, sometimes, supervisory skills) into the VESL and computer skills classes, but most stopped short of offering more substantively technical training. Either for personnel-management reasons or for competitive reasons, employers are not likely to want to train large numbers of entry-level employees in technical skills that would be required for higher-level positions — particularly if the skills require acquisition of proprietary processes. To address this challenge, an advancement-focused program could choose to target a small set of advancement openings and could use an existing model — such as an approach using on-the-job training — to subsidize wages for these advancement trainees. The downside of this approach is that it is absolutely limited by the number of short-term advancement openings that the employer can offer. Alternatively, an advancement-focused model could explicitly negotiate with employers to pool job opportunities across firms and backfill entry-level positions, as is done in some existing sector-based programs.

The training offered in Fort Worth was the most attractive component of the program, both for employers and for employees. However, while many employees were satisfied with the basic skills training provided by WASC, others requested more technical skills training that would have led directly to work-relevant certifications. Greater worker involvement in the development of WASC training content could address this limitation, if the employer concerns outlined above could be addressed. Alternatively, program funding could be limited to provide only training that explicitly leads, at least incrementally, to an employer- or industry-recognized certification or credential.

**Employer incentives to participate.** While employers in high-growth industries might have a natural incentive to implement something like WASC, other good employers may require a nudge to participate in any initiative that might mean advancing workers up and out of their companies. Such a nudge could come in the form of tax credits to help offset the cost of paid release time and to compensate for the cost of replacing employees who leverage their newly acquired skills to find better-paying jobs in other firms.

**Coaching.** The logistical challenges that the Fort Worth team encountered suggest that individual career coaching may not be cost-effective to deliver to employees in a workplace setting. The effort involved — in recruiting employees and then visiting them individually on-site at their workplace — may not be scalable. Nevertheless, for workplaces that could accommodate individual coaching meetings, the arrangement was convenient for participants despite being inconvenient for program staff (at least, by comparison with centralized service delivery venues such as One-Stop Centers). To explore whether the extra effort and expense are worth-

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<sup>46</sup>Along similar lines, several employers cited the random assignment design of WASC enrollment as a factor that gave them little control over who would participate in the program.

while, rigorous research is needed to understand the value of individual coaching, either by itself or when coupled with skills training.

**Work supports.** As noted above, most of the low-wage workers who were recruited by Fort Worth were ineligible for key work supports, and employers do not know their workers' household incomes. Given such uncertainties, providing work support outreach through employers may simply be inefficient. Like individual coaching, work support assistance was valued by some WASC participants and employers. However, it was comparatively difficult to implement, particularly because public work support agencies were not directly involved in the project. Based on the reactions of Fort Worth employers and employees, it seems unlikely that work support assistance could have been marketed effectively to them on a stand-alone basis. Future efforts would need to focus on supports with simpler or higher-income eligibility cutoffs or would need to find better ways to target a pool of workers who are likely to be eligible. Also, for those who do appear to be eligible for work supports, simplifying the application and enrollment processes — directly involving the agencies that administer those supports — could make signing up more attractive to low-wage workers.<sup>47</sup>

**System capacity.** The local workforce board that implemented WASC reported that taking part in the project meant expanding its capacity to design and deliver skills training to entry-level workers within their workplace as well as increasing its expertise in the area of services provided to individuals after they have found jobs. Much of this was made possible because the site used flexible, discretionary WIA dollars to fund WASC. For several reasons, operating WASC-like services on a wider scale would be challenging under existing WIA formula funding and rules, even under a customized training umbrella.

1. The 1998 WIA law provides no earmarked funding stream for *employed worker services*. In principle, the law allows localities discretion in determining whether employed workers can be served using formula funding, and it offers flexibility in setting wage and income guidelines for employed participants. In practice, however, many localities have been uncertain as to whether they can prioritize services to the employed population.
2. Although the law encourages the involvement of employers both in WIA *governance* and in WIA-funded *activities* (the design and delivery of services), in practice, only the former has been a universal feature of WIA implementation.<sup>48</sup> The law provides no explicit design guidelines for working with em-

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<sup>47</sup>Simplification was undertaken in the other WASC demonstration sites, some of which showed positive impacts on participation in work supports (Miller, Tessler, and van Dok, 2009).

<sup>48</sup>U.S. General Accounting Office (2003).

employers to provide services to their existing employees. In many localities, WIA-funded business services consist mainly of recruitment and training of new hires as well as services for dislocated workers (generally, workers who have been laid off and are unable to regain employment in the same field at similar wages). To support the training of incumbent workers, most employers and workforce boards use non-WIA funding — particularly, state economic development funds.

3. Many employers have cited paperwork as a barrier to using workforce system funds. Simpler eligibility guidelines, enrollment procedures, and outcome reporting could make it easier for employers to participate. And although the old WIA earnings gain performance measurement is no longer a disincentive to serving employed individuals under WIA, performance measures are still only about individuals — not employers. It might be desirable for public systems to use outcome measurements that capture the benefits of employed worker services from the perspective of firms as well as workers.

Changes to the next iteration of the Workforce Investment Act could address at least some of these issues, as could continued innovation through competitive federal initiatives and, eventually, a dedicated stream of funding for low-wage, incumbent-worker programs and/or federal matching of state-sponsored initiatives.

Yet these challenges point to a final set of unanswered questions about WASC's employer based-model: Is there sufficient demand for these services, *for entry-level workers*, on the part of employers? And, if so, would there be sufficient benefits — both to employers and to low-wage workers — for offering such services widely? Over a roughly two-year period, about thirty firms were approached by the Fort Worth team. Of these, twelve expressed interest in the WASC project, and seven were able to finalize an implementation plan and host the program. Training opportunities struck a more responsive chord among both employers and employees than did coaching or work supports, for which there was little initial demand. Employers were receptive to the idea of on-site advancement services, *when those services were defined primarily as training*. Nevertheless, while it might seem self-evident that many employers would take up an offer of free employee training, WASC's target population of low-wage workers and its advancement focus — and the assumptions and expectations that come with this population and this focus — undoubtedly complicated some employers' decisions about whether to participate. Therefore, even assuming that many of the workforce system's capacity issues (described above) could be resolved and that a program-staffing model and funding structure could be established that allows for a long development curve for work with employers, it is not clear

that a sufficient number of suitable employers would want to implement a program that focuses on advancing entry-level and other low-wage workers.

Finally, the study will not disclose the effects of WASC employer-based services on outcomes that employers value (such as productivity and workforce turnover rates) or its effects on participants' earnings, receipt of work supports, or subsequent employment patterns after their participation in the project. Although some participants were able to move into higher-paying jobs at their initial employers or at other employers, it is not clear whether WASC services were the primary cause of these advancements — or whether participants would have advanced, on average, in equal numbers in the absence of WASC services.

The results from other WASC demonstration sites, based in One-Stop Career Centers, are providing experimental evidence on whether these types of services have measurable impacts on workers' earnings and total incomes — but not in a workplace setting. Likewise, data from other employer-based programs can provide some indication of the outcomes associated with certain service components that were present in Fort Worth's program, but they do not encompass WASC's full package of coaching, training, and work support assistance. Given the considerable policy interest paid to employer services and employer-based interventions, further investigation into the effects of employer-based services, and their associated costs, would help clarify which are truly worth replicating on a larger scale.



**Appendix**

**Characteristics of the Research Sample**



The Work Advancement and Support Center Demonstration

Appendix Table A.1

Selected Characteristics of the Fort Worth WASC Research Sample at Baseline,  
by Employer

Characteristic	Logistics		Manufacturing		Large Hotel		Small Hospital		Midsize Hotel		Total	
<b><u>Demographic characteristics</u></b>												
Gender (%)												
Female	73.8		78.0		69.6		100.0		70.0			75.0
Age (%)												
18-24	21.6		0.0		0.0		12.5		20.0			14.7
25-34	24.0		2.6		17.4		0.0		0.0			17.2
35-44	24.0		34.2		26.1		37.5		40.0			27.5
45-62	30.4		63.2		56.5		50.0		40.0			40.7
Average age (years)	37.3		47.9		44.6		42.0		39.5			40.5
Race/ethnicity (%)												
Hispanic	24.4		41.5		78.3		12.5		70.0			35.4
White	7.9		0.0		13.0		12.5		10.0			7.2
Black	29.1		2.4		4.3		75.0		10.0			22.0
Asian/Pacific Islander	26.8		56.1		0.0		0.0		10.0			27.8
Other	11.8		0.0		4.3		0.0		0.0			7.7
Citizenship (%)												
Born in United States	43.3		7.3		21.7		100.0		30.0			35.1

(continued)



**Appendix Table A.1 (continued)**

Characteristic	Logistics		Manufacturing		Large		Small		Midsize		Total	
	Hotel	Hospital	Hotel	Hospital	Hotel	Hospital	Hotel	Hospital	Hotel	Hospital		
English proficiency (%)												
Speaks English very well	54.3	2.4	2.4	100.0	17.4	100.0	30.0	40.7				
Speaks English well	29.9	2.4	0.0	0.0	8.7	0.0	20.0	20.6				
Does not speak English well	15.7	73.2	0.0	0.0	56.5	0.0	20.0	31.1				
Does not speak English at all	0.0	22.0	0.0	0.0	17.4	0.0	30.0	7.7				
Languages spoken <sup>a</sup> (%)												
English	96.9	2.4	30.4	100.0	30.4	100.0	50.0	68.9				
Spanish	26.8	41.5	82.6	0.0	82.6	0.0	50.0	35.9				
Chinese, Laotian, Korean, or Vietnamese	22.8	56.1	4.3	0.0	4.3	0.0	20.0	26.3				
Other	27.6	0.0	0.0	0.0	0.0	0.0	20.0	17.7				
<b><u>Family composition</u></b>												
Marital status (%)												
Single, never married	42.5	7.3	31.8	50.0	31.8	50.0	30.0	34.1				
Married and living with spouse	37.8	70.7	36.4	0.0	36.4	0.0	50.0	43.3				
Married but living apart from spouse	11.0	9.8	4.5	25.0	4.5	25.0	0.0	10.1				
Legally separated	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.5				
Divorced	6.3	9.8	18.2	12.5	18.2	12.5	20.0	9.1				
Widowed	1.6	2.4	9.1	12.5	9.1	12.5	0.0	2.9				
Living with a partner (%)	1.6	0.0	18.2	12.5	18.2	12.5	0.0	3.4				
Number of children (%)												
0	56.3	41.5	50.0	14.3	50.0	14.3	30.0	50.0				
1	20.6	26.8	22.7	42.9	22.7	42.9	40.0	23.8				
2	16.7	19.5	18.2	28.6	18.2	28.6	10.0	17.5				
3 or more	6.3	12.2	9.1	14.3	9.1	14.3	20.0	8.7				
Average number of children	0.8	1.0	0.9	1.6	0.9	1.6	1.6	0.9				

(continued)

**Appendix Table A.1 (continued)**

Characteristic	Logistics		Manufacturing		Large		Small		Midsized		Total
	Hotel	Hotel	Hotel	Hotel	Hotel	Hotel	Hotel	Hotel	Hotel	Hotel	
Age of youngest child <sup>b</sup> (%)											
0-2	37.5	16.7	0.0	33.3	28.6	27.9					
3-5	17.9	12.5	18.2	0.0	14.3	15.4					
6-12	23.2	29.2	45.5	50.0	28.6	28.8					
13-18	21.4	41.7	36.4	16.7	28.6	27.9					
Average age of youngest child (years)	6.7	9.5	10.5	8.0	7.4	7.9					
Family size (%)											
1	39.4	9.8	26.1	12.5	20.0	30.1					
2	20.5	17.1	39.1	25.0	20.0	22.0					
3	22.0	19.5	13.0	37.5	30.0	21.5					
4 or more	18.1	53.7	21.7	25.0	30.0	26.3					
<b>Education</b>											
Highest grade (%)											
Grade 9 or less	2.4	51.2	52.2	12.5	40.0	19.6					
Grade 10 or 11	6.3	7.3	8.7	25.0	20.0	8.1					
Grade 12; no diploma or GED certificate	12.6	9.8	0.0	12.5	0.0	10.0					
GED certificate	5.5	0.0	8.7	0.0	0.0	4.3					
High school diploma	32.3	19.5	17.4	37.5	20.0	27.8					
Some college or advanced training courses	27.6	9.8	13.0	12.5	10.0	21.1					
Associate's degree	2.4	0.0	0.0	0.0	0.0	1.4					
4-year college degree or higher	11.0	2.4	0.0	0.0	10.0	7.7					
High school diploma, GED certificate, or above (%)	78.7	31.7	39.1	50.0	40.0	62.2					

(continued)

**Appendix Table A.1 (continued)**

Characteristic	Logistics		Manufacturing		Large Hotel		Small Hospital		Midsize Hotel		Total
Currently enrolled in education or training program <sup>a</sup> (%)	11.0	17.9	25.0	0.0	10.0	13.3					
English as a Second Language (ESL)	5.5	17.1	26.1	0.0	10.0	10.0					
High school/GED preparation course	0.8	0.0	0.0	0.0	0.0	0.5					
College course toward associate's/two-year degree	3.2	0.0	0.0	0.0	0.0	2.0					
College course toward bachelor's/four-year degree	0.8	0.0	0.0	0.0	0.0	0.5					
Other	0.8	0.0	0.0	0.0	0.0	0.5					
<b><u>Labor force status</u></b>											
Current employment											
Number of jobs (%)											
1	95.3	100.0	82.6	75.0	100.0	94.3					
2	4.7	0.0	17.4	25.0	0.0	5.7					
Number of months in current job (%)											
Less than 1	5.5	0.0	4.8	0.0	0.0	3.9					
1-3	12.6	5.0	4.8	37.5	30.0	12.1					
4-6	14.2	0.0	0.0	0.0	0.0	8.7					
7-12	43.3	5.0	4.8	0.0	30.0	29.6					
13-24	18.9	5.0	14.3	37.5	10.0	16.0					
25 or more	5.5	85.0	71.4	25.0	30.0	29.6					
Average number of months in current job	10.7	85.4	31.9	23.7	25.7	28.6					
Hours per week of work (%)											
1-19	21.0	2.5	9.1	0.0	0.0	14.2					
20-29	0.0	0.0	0.0	12.5	0.0	0.5					
30-34	0.0	0.0	4.5	0.0	0.0	0.5					
35-39	0.0	90.0	0.0	0.0	0.0	17.6					
40-72	79.0	7.5	86.4	87.5	90.0	66.7					
73 or more	0.0	0.0	0.0	0.0	10.0	0.5					

(continued)

**Appendix Table A.1 (continued)**

Characteristic	Logistics		Manufacturing		Large		Small		Midsize		Total
	Hotel	Hospital	Hotel	Hospital	Hotel	Hospital	Hotel	Hospital	Hotel	Hospital	
Average hours per week	32.3	37.2	36.2	38.0	44.0	34.5					
Working full time (35 or more hours per week) (%)	79.0	97.5	86.4	87.5	100.0	84.8					
Work schedule (%)											
Fixed	97.5	97.5	87.0	71.4	40.0	92.5					
Hourly wage (%)											
Less than \$5.15	0.8	0.0	0.0	0.0	0.0	0.5					
\$7.00 - \$8.99	23.3	48.6	78.3	37.5	70.0	37.4					
\$9.00 - \$10.99	74.2	51.4	21.7	25.0	30.0	59.6					
\$11.00 - \$14.99	1.7	0.0	0.0	25.0	0.0	2.0					
\$15.00 - \$19.99	0.0	0.0	0.0	12.5	0.0	0.5					
Average hourly wage (\$)	9.39	8.94	8.51	10.11	8.06	9.17					
Weekly earnings (%)											
Less than \$100	21.2	2.8	9.1	0.0	0.0	14.4					
\$100 to less than \$200	0.0	0.0	0.0	12.5	0.0	0.5					
\$200 to less than \$300	0.0	5.6	4.5	12.5	40.0	4.1					
\$300 to less than \$400	60.2	91.7	72.7	37.5	40.0	65.5					
\$400 or more	18.6	0.0	13.6	37.5	20.0	15.5					
Average weekly earnings (\$)	303.10	333.39	304.86	386.50	355.50	315.06					
Fringe benefits from employer <sup>a</sup> (%)											
Time off with pay	100.0	97.6	100.0	100.0	100.0	99.5					
Health plan	97.6	97.6	100.0	100.0	100.0	98.1					
Dental plan	97.6	95.1	100.0	87.5	80.0	96.2					
Retirement plan	70.9	90.2	100.0	75.0	70.0	78.0					
Other	8.7	20.0	21.7	25.0	20.0	13.5					

(continued)

**Appendix Table A.1 (continued)**

Characteristic	Logistics		Manufacturing		Large Hotel		Small Hospital		Midsize Hotel		Total
Enrolled in employer-provided health or medical insurance plan (%)	29.9	95.1	60.9	75.0	60.0	49.3					
<u>Circumstances that may affect job retention or job change (%)</u>											
Has driver's license	93.7	95.1	87.0	75.0	80.0	91.9					
Has access to a car to drive to work	92.1	92.7	87.0	75.0	80.0	90.4					
Is currently receiving help finding new or additional job	1.6	0.0	0.0	0.0	0.0	1.0					
Has physical or mental health problem that limits work	0.8	0.0	4.3	0.0	0.0	1.0					
<u>Dislocated Worker status</u>											
Became a Dislocated Worker during previous 2 years <sup>a</sup> (%)	8.7	2.4	17.4	12.5	10.0	8.6					
Certified or participating in Dislocated Worker program	0.8	0.0	13.0	0.0	10.0	2.4					
Laid off, unlikely to return to previous industry or occupation	4.8	2.4	8.7	0.0	0.0	4.3					
Laid off as part of plant closure or mass layoff	5.6	0.0	4.3	12.5	0.0	4.3					
Business failure because of local economy or natural disaster	0.8	0.0	0.0	0.0	0.0	0.5					
Displaced homemaker	1.6	0.0	4.3	0.0	0.0	1.4					
Current wages compared with wages at job before layoff <sup>c</sup> (%)											
A lot less	66.7	0.0	50.0	0.0	0.0	50.0					
About the same amount	33.3	100.0	0.0	0.0	0.0	33.3					
More	0.0	0.0	50.0	0.0	0.0	16.7					
<b><u>Income and work supports</u></b>											
Average monthly family income (\$)	3,185	2,452	2,147	1,789	1,538	2,795					
Family income exceeds (%)											
130 percent of federal poverty level	100.0	100.0	100.0	50.0	100.0	98.1					
200 percent of federal poverty level	100.0	100.0	100.0	0.0	100.0	96.2					

(continued)

**Appendix Table A.1 (continued)**

Characteristic	Logistics		Manufacturing		Large Hotel		Small Hospital		Midsize Hotel		Total
Currently receiving income or work support (%)											
Earnings from spouse or partner	31.5		58.5		40.9		0.0		30.0		36.5
Food stamps	6.3		4.9		0.0		0.0		10.0		5.3
Child support	2.4		0.0		4.5		0.0		0.0		1.9
Child care subsidy	0.0		0.0		0.0		12.5		0.0		0.5
Other types of assistance	0.0		0.0		4.3		0.0		11.1		1.0
<u>Received tax credits (%)</u>											
Filed tax return during past 12 months	96.8		97.6		87.0		87.5		80.0		94.7
Aware of Earned Income Tax Credit	63.8		19.5		47.8		100.0		50.0		54.1
Claiming Earned Income Tax Credit	32.3		4.9		39.1		75.0		40.0		29.7
Aware of Child Tax Credit	26.0		36.6		30.4		62.5		60.0		31.6
Claiming Child Tax Credit	15.7		34.1		39.1		25.0		50.0		23.9
<u>Medical coverage</u>											
Sample member has coverage (%)	52.0		100.0		78.3		75.0		70.0		66.0
Employer-provided or other private health plan	49.6		100.0		78.3		75.0		70.0		64.6
Publicly funded coverage	3.1		0.0		0.0		0.0		0.0		1.9

(continued)

**Appendix Table A.1 (continued)**

Characteristic	Logistics		Manufacturing		Large Hotel		Small Hospital		Midsize Hotel		Total
Sample member's children have coverage <sup>b</sup> (%)	61.8	41.7	58.3	16.7	57.1	53.8					
Publicly funded coverage	31.5	16.7	18.2	0.0	42.9	25.5					
<b><u>Housing status</u></b>											
Current living arrangement (%)											
Owns home or apartment	31.5	58.5	47.8	25.0	20.0	37.8					
Rents home or apartment	45.7	31.7	39.1	62.5	80.0	44.5					
Lives with family/friends and pays part of the rent	18.1	2.4	8.7	12.5	0.0	12.9					
Lives with family/friends and pays no rent	4.7	0.0	4.3	0.0	0.0	3.3					
Lives in a group shelter	0.0	7.3	0.0	0.0	0.0	1.4					
Lives in public housing (%)	0.8	0.0	0.0	0.0	10.0	1.0					
Receives Section 8 rental assistance (%)	3.1	0.0	0.0	0.0	0.0	1.9					
Pays reduced rent because of low income (%)	2.4	0.0	0.0	0.0	0.0	1.4					
<b><u>Connection to WASC</u></b>											
Sources of information about WASC <sup>a</sup> (%)											
Direct marketing (phone call, e-mail, letter, or postcard)	0.9	0.0	0.0	0.0	55.6	3.9					
Friend or family	10.3	11.1	8.3	0.0	0.0	9.1					
Advertisement	36.4	22.2	33.3	0.0	55.6	33.8					
Employer	92.5	100.0	58.3	100.0	22.2	87.0					
Education or training provider	1.9	0.0	0.0	0.0	0.0	1.3					
Open house	9.3	0.0	16.7	0.0	0.0	7.8					

(continued)

**Appendix Table A.1 (continued)**

Characteristic	Logistics		Manufacturing		Large Hotel		Small Hospital		Midsized Hotel		Total
Month of enrollment (%)											
November 2006	0.0	0.0	0.0	0.0	0.0	0.0	100.0	0.0	0.0	0.0	3.8
May 2007	0.0	0.0	0.0	0.0	4.3	0.0	0.0	0.0	100.0	0.0	5.3
June 2007	0.0	0.0	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	19.6
July 2007	0.0	0.0	0.0	0.0	17.4	0.0	0.0	0.0	0.0	0.0	1.9
August 2007	0.0	0.0	0.0	0.0	78.3	0.0	0.0	0.0	0.0	0.0	8.6
March 2008	55.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	34.0
April 2008	43.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	26.3
May 2008	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5
Sample size (total = 209)	127	41	23	8	10						

SOURCE: MDRC calculations from WASC Baseline Information Form.

NOTES: Sample sizes vary because of missing values.

Fort Worth Sample members were enrolled from November 2006 through May 2008.

<sup>a</sup>Detail can sum to more than 100 percent because sample members can record more than one response.

<sup>b</sup>Child-related measures were calculated for sample members with children.

<sup>c</sup>Current wages compared with wages at job before layoff is measured among Dislocated Workers.





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MDRC is a nonprofit, nonpartisan social and education policy research organization dedicated to learning what works to improve the well-being of low-income people. Through its research and the active communication of its findings, MDRC seeks to enhance the effectiveness of social and education policies and programs.

Founded in 1974 and located in New York City and Oakland, California, MDRC is best known for mounting rigorous, large-scale, real-world tests of new and existing policies and programs. Its projects are a mix of demonstrations (field tests of promising new program approaches) and evaluations of ongoing government and community initiatives. MDRC's staff bring an unusual combination of research and organizational experience to their work, providing expertise on the latest in qualitative and quantitative methods and on program design, development, implementation, and management. MDRC seeks to learn not just whether a program is effective but also how and why the program's effects occur. In addition, it tries to place each project's findings in the broader context of related research — in order to build knowledge about what works across the social and education policy fields. MDRC's findings, lessons, and best practices are proactively shared with a broad audience in the policy and practitioner community as well as with the general public and the media.

Over the years, MDRC has brought its unique approach to an ever-growing range of policy areas and target populations. Once known primarily for evaluations of state welfare-to-work programs, today MDRC is also studying public school reforms, employment programs for ex-offenders and people with disabilities, and programs to help low-income students succeed in college. MDRC's projects are organized into five areas:

- Promoting Family Well-Being and Children's Development
- Improving Public Education
- Raising Academic Achievement and Persistence in College
- Supporting Low-Wage Workers and Communities
- Overcoming Barriers to Employment

Working in almost every state, all of the nation's largest cities, and Canada and the United Kingdom, MDRC conducts its projects in partnership with national, state, and local governments, public school systems, community organizations, and numerous private philanthropies.

