Providing Job Search Support for Women Over 50

Interim Report on the Implementation of AARP Foundation's Back to Work 50+: Women's Economic Stability Initiative

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About the Social Innovation Fund

The Social Innovation Fund (SIF) was a program that received funding from 2010 to 2016 from the Corporation for National and Community Service, a federal agency that engages millions of Americans in service through its AmeriCorps, Senior Corps, and Volunteer Generation Fund programs, and leads the nation's volunteer and service efforts. Using public and private resources to find and grow community-based nonprofits with evidence of results, SIF intermediaries received funding to award subgrants that focus on overcoming challenges in economic opportunity, healthy futures, and youth development. Although CNCS made its last SIF intermediary awards in fiscal year 2016, SIF intermediaries will continue to administer their subgrant programs until their federal funding is exhausted.

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Executive Summary

In 2014, the Corporation for National and Community Service (CNCS) selected AARP Foundation to receive a three-year grant under the Social Innovation Fund (SIF) to operate and evaluate the Women's Economic Stability Initiative (WESI) in multiple locations. Using this funding, AARP Foundation seeks to build the capacity of local education and training institutions to address the needs of older women workers between 50 and 64 years of age with incomes between 130 percent and 200 percent of poverty level by helping them prepare for employment in high-growth sectors in their local economies.

AARP Foundation awarded Social Policy Research Associates (SPR) a contract to evaluate the overall effectiveness of the BTW50+: WESI program and identify lessons from its implementation that might inform future programming. The evaluation includes an implementation study, an outcomes study, and an impact study. This report summarizes observations from the implementation study, which so far has included two rounds of site visits to each community college implementing BTW50+: WESI. It also draws on 221 telephone surveys completed with BTW 50+: WESI participants three months after program enrollment as part of the outcomes study.

BTW50+: WESI Subgrantees and Program Model

BTW 50+: WESI started in 2015 with grants to five community colleges. It builds on the prior experiences of 20 AARP Foundation subgrantees in the Back to Work 50+ Classic program, which also supports local education and training institutions to meet the needs of low-income workers between 50 and 64 years of age.

The BTW 50+: WESI program model differs in some important ways from the previous BTW 50+ Classic program, however, including an increased focus on recruiting and serving women, with priority given to unemployed and underemployed women with high school diplomas and some prior work experience. In addition, program funding provided to colleges under the BTW50+: WESI subgrants is substantially greater than previous grants under BTW 50+ Classic, thus allowing participating colleges to increase the number of program staff members and build the colleges' capacity to serve larger numbers of participants.

In late 2015, at the end of the first year of the SIF grant, AARP Foundation determined that one of the original five subgrantees would not continue to be part of the initiative. The Foundation then awarded an additional two subgrants in the winter of 2016, for a total of six community college subgrantees in its SIF portfolio. The community colleges that continued to participate in BTW 50+: WESI and that are covered in this early implementation report are:

- Austin Community College (ACC), Austin, Texas
- Eastern Florida State College (EFSC), Cocoa, Florida
- Jefferson State Community College (JSCC), Birmingham, Alabama
- Miami Dade College (MDC), Miami, Florida

- Santa Fe College (SFC-FL), Gainesville, Florida
- Santa Fe Community College (SFCC-NM), Santa Fe, New Mexico

For participants, referred to as job candidates, the BTW 50+: WESI program model emphasizes individual choice, confidence building through coach and peer group support, employer access, and short-term training in occupations in high-growth high-wage sectors of the local economy to prepare job candidates for stable employment at a living wage and opportunities for career advancement.

The model requires the delivery of a continuum of core services delivered through group workshops and individual coaching sessions, including:

- career coaching,
- supportive services,
- computer skills training,
- financial capability building, and
- job search skills and employer engagement.

Following the completion of core services, some job candidates enroll in short-term occupational skills training, while others look for employment in their chosen occupational fields. Through the completion of this model, intended impacts include increased post-program employment, increased post-program average earnings, and, for training participants, higher rates of training completion compared to a matched comparison group.

Overview of Prior Research

Prior research relevant to BTW50+: WESI includes evaluations of programs targeted to older workers, as well as evaluations of the effectiveness of sectoral employment strategies to increase the employment and earnings of unemployed and underemployed workers. Previous studies of the effectiveness of programs developed for older workers have been very limited. These evaluations have used preliminary studies—the first tier of evidence under the SIF guidelines—of the outcomes of participants in programs targeted to older workers (without control or comparison groups) to identify service designs likely to be effective with older workers (Kogan et al., 2012; Kogan et al., 2013).

The most robust research related to the proposed program design is on the effectiveness of sectoral approaches to prepare participants for high-quality jobs in high-growth fields. Because sectoral strategies target higher-wage industries with a demand for workers, participants are expected to achieve both increased rates of employment and increased wages as compared to individuals participating in other types of workforce development programs. Recent net impact evaluations of programs with a sectoral strategy have confirmed this hypothesis (Hendra et al., 2016; Maguire et al., 2010).

The BTW50+: WESI Evaluation

AARP Foundation engaged SPR to design and implement a unified subgrantee evaluation across all participating community colleges. The evaluation is anticipated to yield a moderate level of evidence about the impacts of the BTW50+: WESI program model (based on SIF's evidence tiers). BTW50+: WESI has not undergone any previous implementation, impact, or outcome evaluation. While AARP Foundation has been tracking a limited number of outputs for the existing Back to Work 50+ Classic sites, this activity has been for performance monitoring rather than evaluation. For example, outputs tracked for the previous cohort include the number of individuals who attend an information session and the percentage of those individuals who enroll in the program. This information is critical for program managers to monitor operations and is suggestive of the potential value of the program model. However, it does not constitute a formal evaluation of program outcomes, impacts, or implementation. Targeting moderate evidence of effectiveness by the end of the grant period thus represents an appropriate movement along the evidence continuum for this particular intervention.

The evaluation comprises three components:

- The **implementation study** is designed to describe and assess the program's fidelity to the prescribed model, implementation challenges, and best practices. Much of the data collection for the implementation study occurs during annual site visits to each participating college.

- The **outcomes study** is measuring service intensity and participant outcomes using two data sources: the program's electronic client profile and management system (Foundation Impact System) and telephone surveys of job candidates at three months, six months and 12 months after program enrollment. Specific self-reported outcome measures include post-program employment rate, post-program average earnings, changes in financial capability, computer use attitudes, and quality of life. For job candidates who enroll in training, it also includes completion of training.

- The **impact study** will use propensity score matching to create a comparison group using administrative data from state unemployment insurance (UI) data and Workforce Innovation and Opportunity Act (WIOA) program data. To ensure that the projects and services had reached a mature state, enrollment of job candidates into the impact study did not begin until August 2016, about one year after the initial project start-up. The matched comparison group will have access to standard job search support services available through the public workforce system. Although WIOA services can include career information and guidance, referral to needed support services, and access to occupational skills training, comparison group members will not necessarily receive a comprehensive sequence of services and the services they do receive might not be customized for the needs of either older workers or women. This group will be compared with BTW 50+: WESI job candidates on three key measures: post-program employment rate, post-program average earnings, and, for training participants, completion of training.

Overall, the expected sample size for the impact study is 2,800—1,400 BTW50+: WESI job candidates and 1,400 individuals in the matched comparison group. These estimates will be updated with exact numbers in subsequent deliverables.

Implementation Study Research Questions

One of the important functions of the implementation study is to document the key features of the program model being tested in the impact study so that the evaluation team can interpret and identify lessons from the impact study findings. For example, if the impact study shows that the program has (or does not have) statistically significant impacts for BTW50+: WESI participants compared to members of the matched comparison group sample, understanding the following issues will be important to determining the implications of these findings:

- What are the key features of the BTW50+: WESI program model as intended by AARP Foundation, and to what extent have subgrantees achieved fidelity to this model, as measured through a standardized fidelity assessment checklist?
- How does BTW50+: WESI, as implemented by subgrantees, differ from the services available to comparison group members through the public workforce system and other available resources?
- What challenges have the participating colleges encountered as they have implemented the BTW50+: WESI model?
- How do the different colleges vary in their service designs, community partnerships, and institutional commitment to providing "generationally relevant" services to individuals 50 and older?
- How do subgrantees develop local partnerships that allow the project to leverage community resources to connect candidates with supportive services and job opportunities?
- What skills and experience do BTW 50+: WESI staff members need to be effective in serving older workers?
- To what extent do sub-grantees target different subsets of job candidates, such as women who have experienced economic hardship as a result of limited work experience or long spells of unemployment, women with limited English language or literacy skills, or women over 60 years of age?
- How have BTW 50+: WESI job candidates responded to the program?

Additional implementation study research questions specified in the evaluation plan approved by the Social Innovation Fund will inform later phases of implementation study research. By the end of program implementation, the evaluation will also be able to provide important information about challenges and promising practices, from which sites interested in replicating the BTW 50+: WESI model can learn. Questions important to program improvement, sustainability, and replication include the following:

- What do subgrantees identify as their greatest accomplishments and strengths and what do they describe as their greatest challenges in achieving the goals of BTW 50+: WESI?
- What do job candidates identify as the most valuable components of BTW 50+: WESI services?
- To what extent do subgrantees have the internal capacity and commitment to offer effective training services to the 50+ population after the conclusion of the grant period?

Implementation Study Methods and Instruments

Annual site visits to each community college (two of which have been completed at the time of this interim implementation report) will document program implementation through (1) semi-structured interviews with program staff and partners; (2) observations of program activities; (3) focus groups with job candidates; and (4) completion of a standardized assessment tool to track fidelity to the program model. The second implementation site visits also included visits to a local American Job Center within the program's service area to document the services available to comparison group members through the public workforce system.

Interim Implementation Evaluation Findings and Lessons Learned

Key findings and lessons learned from the first two annual site visits, as well as initial findings from ongoing three-month follow up telephone surveys of job candidates, are summarized below across four topical areas: program management, funding and staffing; recruitment, eligibility, and enrollment; services provides to job candidates; and job candidate perspective.

Program Management, Funding, and Staffing

The report describes the guidance, oversight, and management of BTW50+: WESI, both at the initiative level and at the subgrantee level through the six community colleges implementing the program. It also describes how subgrantees have funded and staffed their program. Key findings include:

- **AARP Foundation provides significant technical assistance to subgrantees and channels for facilitated communication among subgrantees on best practices.** The foundation facilitates a learning community that includes regular one-on-one and group conference calls, regular monitoring visits, an online collaboration platform, and an annual in-person Learning Exchange.
- **The program's database, the Foundation Impact System (FIS), has been challenging for subgrantees to use, despite technical assistance and attempts to streamline data entry.** The FIS is used for both client tracking and for real-time monitoring of progress

towards grant goals. In response to subgrantee feedback on the need for guidance on FIS use, AARP Foundation has developed a user guide and webinars in addition to providing in-person technical assistance during site visits. However, subgrantees still struggle to use the FIS for internal program management and feel that the system could be more user-friendly.

- **At the subgrantee level, most programs use a shared leadership approach in which strategic oversight and daily program management are shared between two or more individuals.** This setup enables subgrantees to have one person focus on compliance while a second focuses on program delivery and ensures overall program quality.
- **The SIF grant's cash match requirement has been challenging for subgrantees.** Subgrantees are required to provide a 1:1 cash match to their subgrant amount in order to receive reimbursement for grant expenses. This necessitates significant staff time and attention beyond what subgrantees had expected, despite all having prior experience operating federal grants.

Recruitment, Eligibility, and Enrollment

To meet their enrollment goals, subgrantees conduct recruitment and outreach with the target population of women ages 50 to 64. They then screen, select, and enroll eligible job candidates from the interested pool. Key findings about the recruitment, eligibility, and enrollment processes include:

- **Subgrantees strive to achieve a balance between relying on AARP Foundation outreach materials and customizing materials to make them appropriate for the local context.** Specific customization practices include targeted outreach to special populations in the community and experimenting with new modes of outreach such as bus wrap ads and short videos for social media sharing.
- **Similarly, while all subgrantees adhere closely to workshop materials provided by AARP Foundation for their 7 Smart Strategies information sessions, they use their understanding of the communities they serve to choose times and locations for these sessions that will maximize attendance.** Some subgrantees hold workshops on a regular monthly or quarterly basis, while others schedule them for just prior to new job candidate enrollment. Subgrantees have also varied the location of these workshops to ensure that applicants from all over the local area can attend.
- **Due to the smaller than expected number of applicants, most subgrantees report that BTW50+: WESI enrolls most applicants.** Because of this, the selection rubric provided by AARP Foundation is used more as a general guide than a determining factor for program acceptance.

Services Provided to Job Candidates

The report describes subgrantees' progress towards implementing the BTW50+: WESI model at the time of the second implementation study visit, the evolution of components during the implementation period, variations in program design and service delivery procedures across the subgrantees, challenges faced and addressed in program implementation, and differentiation of BTW50+: WESI from services available in the absence of the program. Key findings on these topics include:

- **Subgrantees have fully or partially implemented most elements of the program model**. Implementation of the career coaching, computer skills training, and job search skills training elements—on which AARP Foundation provided updated guidance and technical assistance between the first and second implementation study visits—show the highest fidelity to the intended model.

- **Subgrantees struggled most to realize full implementation of the employer engagement component of the program model.** This represents a key area in which the public workforce development system services available to comparison group members may be as strong or stronger than what is offered through BTW50+: WESI.

- **Even within elements of the program implemented with fidelity, subgrantees show notable variations in how they deliver these services.** For example, the format and intensity of computer skills training options vary across sites, and only half of subgrantees offer intermediate level computer skills training classes. Similarly, for occupational skills training, the proportion of job candidates who go on to occupational skills training, and the number and types of occupational skills trainings offered, also vary.

- **Subgrantee familiarity with the target population and with providing similar services is correlated with fidelity of implementation.** Unsurprisingly, prior staff experience with the BTW50+ Classic program model and/or working in the public workforce system appears to strengthen the fidelity with which subgrantees have implemented the program model, both overall and for specific components.

Job Candidate Perspectives

To contextualize findings about program implementation, the report reviews the perspectives of job candidates in BTW50+: WESI as measured through three-month follow up surveys and focus groups conducted during site visits. Key findings include:

- **Self-reported motivations for enrollment indicate that the program is providing accurate messaging in its outreach.** Survey results show that most respondents were motivated to enroll in BTW50+: WESI in order to bolster their job searches, both through learning about new employment opportunities and upgrading their computer skills to be competitive in the job market.

- **While survey results indicate satisfaction with the content of most program components, focus group feedback suggests areas for improvement in service delivery and guidance.** Survey responses show moderately high levels of satisfaction with core components of the program, though feedback from focus groups indicates more interactive and personalized delivery would be appreciated. Additionally, while a high proportion of job candidates expressed interest on the survey in continuing with occupational skills training, focus group feedback points to wide variation in the strength of connection to and guidance on training across subgrantees.

- **Survey respondents report positive attitudes and behaviors at three months after enrollment, but self-reported employment rates are somewhat low.** At three months after enrollment, job candidates report feeling relatively comfortable using computers, say they engage in positive short-term financial behaviors, and are enjoying a relatively high quality of life. However, just under half (48.5 percent) report being employed either full or part time.

Implications for the Impact Study

Visits to local American Job Centers (AJCs) and interviews with BTW50+: WESI staff indicate a relatively strong distinction between the services available to program participants and the services available to the planned comparison group. Distinctive services available only to the BTW50+: WESI job candidates include assessment of computer skills and access to computer skills upgrade training and delivery of financial capability training. Further distinctions in the services available to job candidates in BTW50+: WESI are that services (a) have been tailored to meet the needs of women over 50, in terms of the content of career coaching and job search skills training, and (b) place an emphasis on peer support.

Another feature that is intended to be distinctive for job candidates in the BTW50+: WESI model is employer engagement. To date, the subgrantees have not achieved full fidelity to the high level of employer engagement specified in the program model. Because this is an area in which AJCs are generally strong (with staff time specifically dedicated to business services and job development functions), this may reduce the differences between BTW50+: WESI and the services available to comparison group members—and, therefore, resulting employment and earnings outcomes. This underscores the importance of strengthening fidelity to (and technical assistance on) the employer engagement component of the BTW50+: WESI model.

Additionally, information gathered as part of the implementation study on recruitment, enrollment, and participant perspectives indicates that there may be differences in the background and employment history of BTW50+: WESI job candidates and members of the comparison group who have sought services from the public workforce system. Career coaches reported that job candidates tend to have more employment experience and formal education than anticipated, and visits to local AJCs indicate that, at least for some subgrantees, the workforce system is serving a harder-to-employ population than BTW 50+: WESI. For this reason, it will be important for the impact analysis to present regression-adjusted estimates that control for these differences in background characteristics.

Next Steps for the Implementation Study

Upcoming activities for the implementation study will include the following:

- **Additional site visits** will assess progress towards implementing the model with fidelity, explore subgrantee plans for sustaining the program beyond the SIF grant, and continue to document other services available on campus and in the community to ensure appropriate context for the impact study.
- **Follow-up surveys** at three, six, and 12 months after enrollment will continue for all job candidates who enroll through the end of program implementation.
- **A final implementation study report** will analyze all site visit and focus group data, follow-up survey data, and program dosage and outcome data from the FIS.

Chapter I: Introduction

In 2014, the Corporation for National and Community Service (CNCS) selected AARP Foundation to receive a three-year grant under the Social Innovation Fund (SIF) to operate and evaluate the Women's Economic Stability Initiative (WESI) in multiple locations. Using this funding, AARP Foundation seeks to build the capacity of local education and training institutions to address the needs of older women workers between 50 and 64 years of age with incomes between 130 percent and 200 percent of poverty level by helping them prepare for employment in high-growth sectors in their local economies.

Acknowledging the origins of the SIF program model in AARP Foundation's pre-existing Back to Work 50+ program, the SIF-funded initiative is referred to as Back to Work 50+: Women's Economic Stability Initiative (BTW50+: WESI). In the terminology used by the program, participants are referred to as job candidates. This report reviews the implementation of BTW50+: WESI, including the experiences of job candidates who completed it, at six community colleges selected to implement it through a competitive bid process.

This chapter provides context on the national status of older women as workers, offers a description of the BTW50+: WESI program model, and provides descriptive information about the local context of the six participating community colleges. Further, it presents an overview of the evaluation's research questions and research methods as well as a roadmap for the remainder of the report.

The Context: Women 50+ Years of Age and the Labor Market

Over the last decade, older workers have steadily become a larger share of the U.S. workforce, and this trend is expected to continue into the future (Bureau of Labor Statistics, 2008; Gendell, 2008; National Institute on Aging, 2007; Toossi, 2012). At the same time, older workers are more likely than other workers to have difficulty getting re-employed after they lose a job (Van Horn, Krepcio, & Ridley, 2008). As a result, older workers are becoming a growing share of the long-term and very long-term unemployed, a trend that started before the Great Recession and has steadily advanced. In 2007, about 24 percent of older jobless workers (those age 50 and up) had been out of work for six months or more; this was a higher rate of long-term unemployment than was experienced by any other age group. In 2011, the proportion of older jobless workers out of work for six months or more had jumped to about 54 percent. Moreover, in 2011, older jobless workers were more likely than jobless workers in other age groups to be unemployed for one year or longer (McKenna, 2012).

Research has shown that, in addition to the direct financial impact of unemployment, the unemployed person suffers lower self-esteem, poorer overall well-being, increased isolation, and negative health outcomes as a result of her struggles (Belle & Bullock, 2009). The downward economic spiral beginning with job loss is magnified in its impact by the chain of consequences that subsequently reverberate through their families, homes, neighborhoods, and communities. Moreover, nearly one-third of older Americans have seen their homes decline substantially in value and a sizable proportion have fallen behind on credit card payments or accumulated additional credit card debt (AARP Public Policy Institute, 2013). In addition to struggling to pay current living costs, individuals approaching traditional retirement age are woefully unprepared to maintain their current standard of living in retirement. In describing "the retirement savings crisis," Rhee & Boivi (2015) reported that 62 percent of working households with adult members age 55 to 64 have retirement savings less than the amount of their annual income, suggesting that most older workers will be unable to retire and many will be living in poverty.

Compared to men, women are increasing as a percentage of the aging workforce, and they face particular challenges in achieving stable employment, earnings sufficient to support basic needs, and a strategy to achieve economic security in retirement. Recent research findings show that women over 50 face substantially more age discrimination in the workplace than do older men (Farber, Silverman, & von Wachter, 2015; Neumark, Burn, & Button, 2015).

Older women workers were also the group hardest hit by the Great Recession, in terms of the rate of long-term unemployment (over 27 weeks). Between 2007 and 2013, the incidence of long-term unemployment surged from 14 percent to 50 percent of all women workers over 65 who lost their jobs (Monge-Naranjo & Sohail, 2015). Data also show that women 55 years of age and older are more likely to work part time than other women and in low-skill jobs that are much less likely than full-time jobs to offer benefits such as paid sick leave, retirement plans, or health insurance (USDOL Women's Bureau, n.d.). As the result of a lifetime of reduced income due to multiple factors including gender- and age-based employment discrimination and employment in lower-skilled and lower-wage jobs, women have less in savings and retirement benefits than men. In fact, almost twice as many retired women currently live in poverty as retired men (Older Women's League, 2012).

The public workforce investment system has a mixed record of accomplishment to date in meeting the needs of older workers and women. The Senior Community Service Employment Program (SCSEP), which is the only federal workforce program targeted specifically to older workers, serves only very low-income workers, and is estimated to serve less than 1 percent of those eligible for participation (Kogan et al., 2012). Under the Workforce Investment Act (WIA)—which was replaced in July 2015 by the Workforce Innovation and Opportunity Act (WIOA)—adult and dislocated worker training programs have been increasing their enrollment of workers 55 or older, measured as a percentage of all WIA enrollees over time. However, studies suggest that older workers are less likely than other WIA enrollees to receive training services (Stevens, 2004). Gender is also associated with differences in the services received from WIA and the outcomes achieved by those who exit from WIA. A recent study of women served under WIA's adult and dislocated worker programs noted that although women received training more often than men, that training was concentrated in sales, clerical, and administrative support jobs that led to relatively low average earnings after program exit. In contrast, training for men was concentrated in managerial, administrative, professional, or technical jobs that tended to have higher post-program earnings (Maxwell, Hock, Verbitsky-Savitz, & Reed, 2012).

Overview of Prior Research

Prior research relevant to BTW50+: WESI includes evaluations of programs targeted to older workers, as well as evaluations of the effectiveness of sectoral employment strategies to increase the employment and earnings of unemployed and underemployed workers.

Evaluations of Services for Older Workers. Studies of the effectiveness of programs developed for older workers have been very limited. Previous evaluations have used preliminary studies—the first tier of evidence under the SIF guidelines—of the outcomes of participants in programs targeted to older workers (without control or comparison groups) to identify service designs likely to be effective with older workers. For example, the *Evaluation of the Aging Worker Initiative* (Kogan et al., 2013) used a process study with multiple site visits to each of 10 project sites and feedback from program directors to identify the following program features that were important to or effective with older workers:

- personalized attention and encouragement using peer group or individualized coaching to build participant self-confidence;
- individualized service plans that build on prior work and life experience and transferable skills, as well as personal interests and income needs to identify employment and career goals;
- opportunities to prepare for rapid employment using short-term intensive training programs;
- training that emphasizes hands-on learning, a supportive classroom environment, and the use of competency-based assessments rather than formal academic testing; and
- opportunities to learn and practice using computer applications relevant for job search and on-the-job work tasks.

AARP Foundation has developed its BTW50+: WESI model based in part on the above findings about effective practices in serving older workers. The approach has also been influenced by initial observations of the experiences of participants during the initial pilots of the BTW50+ model, referred to as the "Classic" model. Analysis of outcomes achieved by BTW50+ Classic participants across 11 community colleges that received grants in January 2014 to pilot the program indicates that 30 percent of the job candidates who received coaching services were hired into full- or part-time jobs as of April 2015. This initial analysis suggests the value of more intensive programming like the enhanced model offered under BTW50+: WESI—while 20 percent of participants who were hired by April 2015 attended just one coaching session, almost half of those who became employed (47 percent), received at least five coaching sessions, with 23 percent attending 11 or more sessions.[1] The next step in analysis of outcomes for those programs will be to understand what "dosage" of the program is needed to achieve

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[1] These findings are from early analyses of unpublished data from the Foundation Impact System for the first round of BTW 50+: Classic subgrantees.

the best job placement and retention outcomes. However, like the previous aging research, these analyses did not use a control or comparison group to assess program impacts.

Evaluations of Sectoral Approaches. The most robust research related to the proposed program design is on the effectiveness of sectoral approaches to prepare participants for high-quality jobs in high-growth fields. In addition to employers, other partners, such as workforce development boards, unions, and community colleges, may also be involved in projects using sectoral models (The Workforce Alliance, 2008).

Because sectoral strategies target higher-wage industries with a demand for workers, participants are expected to achieve both increased rates of employment and increased wages as compared to individuals participating in other types of workforce development programs. Recent net impact evaluations of programs with a sectoral strategy have confirmed this hypothesis. The *Sectoral Employment Impact Study* (Maguire et al., 2010) confirmed that over a two-year period after random assignment, program participants were more likely to be employed and earned more, on average, than members of the control group. An evaluation of the first two years of the WorkAdvance initiative also shows positive impacts on both employment and earnings, although the size of the impacts varies across the different providers and does not address the relative impact of different program components (Hendra et al., 2016).

Sectoral programs may differ from the BTW50+: WESI model in important respects, however. For example, whereas sectoral approaches balance the interests of job candidates and employers as dual customers of the program, the BTW50+: WESI model emphasizes job candidates as the primary customer. Furthermore, BTW50+: WESI program grantees have identified from two to six different economic sectors in which to focus their efforts, rather than a single industry. BTW50+: WESI also diverges from the sector employment model by developing an individualized training plan for each participant and drawing on existing training programs rather than screening and referring individuals into a new training pipeline developed for a specific industry sector.

Evaluations of sectoral employment programs provide several additional findings and implications that may be relevant for BTW50+: WESI. These include:

- **The importance of program maturity.** The evaluations indicated that programs benefited from having been in place long enough to work through initial challenges and build strong relationships with local partners. The evaluation of BTW50+: WESI incorporates this lesson in its design by allowing for a full year of program implementation at most subgrantees[2] prior to enrolling job candidates in the impact study.

[2] As detailed in the next section, two out of six subgrantees did not begin operating their programs until just prior to the start of impact study enrollment.

- **The importance of flexibility to adapt to a changing labor market.** The identification of multiple sectors by BTW50+: WESI subgrantees may enable the projects to be agile enough to shift training focus if a targeted sector experiences a downturn.

- **The importance of strong links to local employers.** Several studies noted that connections to local employers cannot be superficial. The *Sectoral Employment Impact Study* identified the need to include employer partners from the beginning of program design (Maguire et al., 2010), and a report on effective government/business partnerships suggested that businesses be given a "lead role" in defining job training (Duke et al., 2006). Individual BTW50+: WESI grantees have developed a variety of ways to involve employers. It does not appear, however, that employers will be "driving" the BTW50+: WESI training designs.

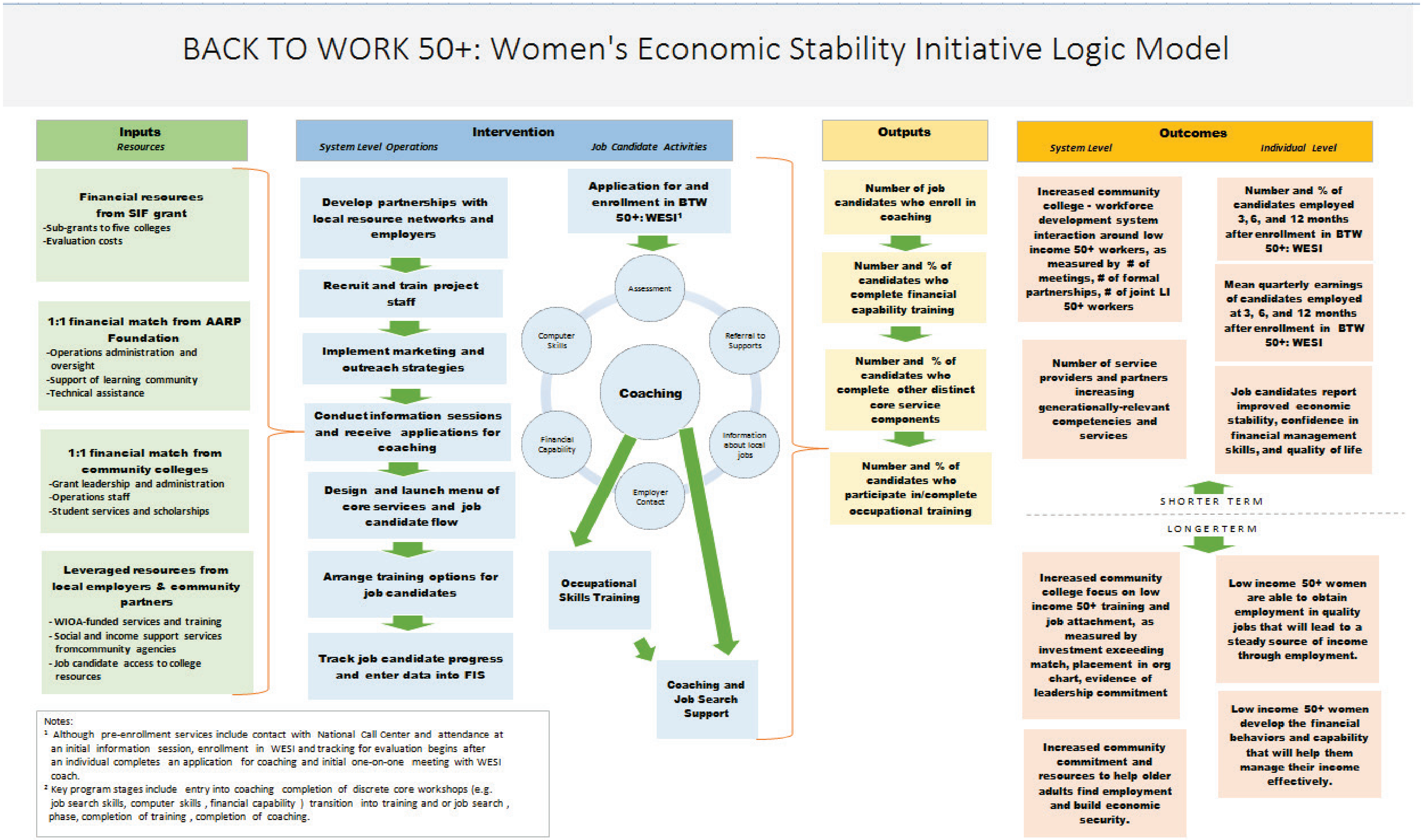
- **The importance of effective screening of potential participants.** Multiple studies mentioned the importance of effective screening of potential participants to ensure a good fit with the program (Maguire et al., 2010; Oertle et al., 2010; Taylor & Rubin, 2005). The BTW50+: WESI program differs from the sectoral employment model because of its emphasis on the needs of job candidates rather than employers as the determining factor in participant enrollment and program design. This suggests that BTW50+: WESI subgrantees face a slightly different challenge: rather than ensuring that applicants are a good fit for the targeted occupation, BTW50+: WESI subgrantees have had to figure out how to refine program components, including occupational skills training offerings, to fit the needs of job candidates who have enrolled in their program. Nevertheless, BTW50+: WESI's intention to target participants with high school diplomas and prior employment histories will help to ensure that job candidates are similar enough that many of the planned program components will be appropriate.

The BTW50+: WESI program model builds on an understanding of the challenges facing older women workers, as documented in previous research, and lessons learned from previous sectoral employment research efforts. The evaluation will test the efficacy of programs housed within community colleges that provide a continuum of services including job and career coaching, referral to needed support services, financial capability training, training to upgrade computer skills, and, if appropriate, connection to occupational skills training programs.

The BTW50+: WESI Program Model

Exhibit I-1 on the following page shows the logic model for the program as developed for the program's Social Innovation Fund Sugbrantee Evaluation Plan:

Exhibit I-1: BTW50+: WESI Program Logic Model



As described earlier, BTW50+: WESI builds on the prior experiences of local organizations that implemented the BTW50+ Classic program. Like BTW50+ Classic, the BTW50+: WESI program seeks to build the capacity of local education and training institutions to address the needs of older women workers between 50 and 64 years of age with incomes between 130 percent and 200 percent of poverty level.

The BTW 50+: WESI program model differs in some important ways from the previous BTW 50+ Classic program, however, including an increased focus on recruiting and serving women, with priority given to unemployed and underemployed women with high school diplomas and some prior work experience. In addition, program funding provided to colleges under the BTW50+: WESI subgrants is substantially greater than previous grants under BTW 50+ Classic, thus allowing participating colleges to increase the number of program staff members and build the colleges' capacity to serve larger numbers of participants.

AARP Foundation initially awarded subgrants to five community colleges to implement BTW50+: WESI. In late 2015, at the end of the first year of the SIF grant, AARP Foundation determined that one of the original five subgrantees would not continue to be part of the initiative. The Foundation then awarded an additional two subgrants in the winter of 2016, for a total of six community college subgrantees in its SIF portfolio. The community colleges that continued to participate in BTW 50+: WESI and that are covered in this early implementation report are:

- Austin Community College (ACC), Austin, Texas
- Eastern Florida State College (EFSC), Cocoa, Florida
- Jefferson State Community College (JSCC), Birmingham, Alabama
- Miami Dade College (MDC), Florida
- Santa Fe College (SFC-FL), Gainesville, Florida
- Santa Fe Community College (SFCC-NM), Santa Fe, New Mexico

Under the current SIF grant, subgrantees will serve a total of 1,400 job candidates. At each participating subgrantee, job candidates are anticipated to move through the program in eight or more cohorts or "waves" of about 30 participants each.

As described in Chapter 2, AARP Foundation has played an active role introducing the desired program model and providing technical assistance and support throughout the SIF grant period. To document the key features of the program design and implementation practices, AARP Foundation developed a BTW50+: WESI Playbook that describes the program goals and philosophy, key features of the program, expectations for program design, and operations and best practices. The Playbook has been updated several times, as the growing experience of AARP Foundation and the subgrantees has yielded new model refinements. The program description included in this report is based on the most recent version of the Playbook, updated in April 2016.

At the system level, the essential elements of the BTW 50+: WESI model include:

- developing local partnerships led by community colleges and including employers, the public workforce development system, and other local programs serving older individuals;
- identifying sectors of the local economy and specific occupations within those sectors that offer opportunities for job growth and job stability; and
- developing comprehensive sequences of services to build the capacity of local partners to address the needs of unemployed and underemployed women aged 50 and over.

The BTW 50+: WESI program model emphasizes individual choice, confidence building through coach and peer group support, employer access, and short-term training in occupations in high-growth high-wage sectors of the local economy to prepare job candidates for stable employment at a living wage and opportunities for career advancement. Successful implementation of the model at the individual service delivery level requires effective recruitment and outreach to potential participants (with support from a national call center operated by AARP Foundation).

The model requires the delivery of a continuum of core services delivered through group workshops and individual coaching sessions, including:

- career coaching and cohort community building,
- supportive services,
- computer skills training,
- financial capability building, and
- job search skills and employer engagement.

Following the completion of core services, some job candidates enroll in short-term occupational skills training, while others look for employment in their chosen occupational fields. Exhibit I-2 illustrates graphically how the critical components of the BTW50+: WESI program model are woven together by the delivery of individual coaching throughout the program period. Initially, the core services phase of program participation (services received prior to entry into occupational skills training) was designed to be completed within 10 weeks of program enrollment. In practice, as will be detailed later in the report, most subgrantees target completion of core services in a shorter timeframe.

Exhibit I-2: Core BTW50+: WESI Services

Characteristics of the Participating Colleges

The community colleges participating in BTW50+: WESI share some characteristics and vary on others, as shown in Exhibit I-3. As community colleges, all the schools offer a mix of academic programs designed for students interested in transferring to four-year colleges as well as technical programs leading to an associate's degree or credit-bearing certificate. As noted in Exhibit I-3, most of the colleges also offer not-for-credit vocational programs and continuing education programs, and serve a mix of full- and part-time students.

Three of the colleges are located in small urban areas (JSCC in Birmingham, Alabama; SFC in Gainesville, Florida; SFCC-NM in Santa Fe, New Mexico), while one college is in a medium-sized urban area (EFSC in Cocoa, Florida); two colleges are located in large urban areas with major central cities (ACC in Austin, Texas; MDC, in Miami, Florida). Among other things, the community setting affects the diversity and number of jobs in the local economy as well as the extent of public transportation available to job candidates for travel to school and to jobs. It also affects the size of the population pool from which job candidates can be recruited.

The number of students attending each of these institutions is strongly influenced by the population of the local service area. In addition, colleges that serve a larger population or an extended geographic area tend to depend on multiple campuses to make programs accessible to students throughout the service area. The participating colleges range from the very large MDC, which has over 165,000 students enrolled at seven campuses, to the more modestly sized JSCC, which, with an enrollment of 8,000 students served by four campuses, is the second largest community college in the state of Alabama.

Exhibit I-3: Characteristics of Participating Colleges

Community College	Size of Community Served	Size of School	Previous Experience Serving Older Students or Women	Special Characteristics of Targeted Population	Labor Market Conditions/ Targeted Sectors
Austin Community College (TX)	Large city/ urban area	Large: 43,000 students for-credit, 15,000 students non-credit.	New staff members have experience with Women in IT Initiative.	Not described.	Unemployment very low (2–3%). Targeted jobs in technology, health care, and business services, particularly high growth in tech sector.
Eastern Florida State College (FL)	Medium sized urban/ suburban area	Medium: 23,000 students across four campuses.	Prior experience operating the WENDI program for displaced homemakers.	Women over 50 who had attended college in the last five years.	Unemployment around 4%, but many jobs pay low wages. Goal for participants is jobs that will enable self-sufficiency.
Jefferson State Community College (AL)	Small city/ urban and suburban/ rural	Smaller: 8,000 students for-credit, 2,000 students non-credit at four campuses across four counties.	Substantial: Former short-term training program for single mothers and BTW50+ Classic.	Interested in reaching women in city as well as in less populated areas.	Unemployment around 5%, high poverty rate, particularly for older women. Targeted sectors in health care and office occupations.
Miami Dade College (FL)	Very large city/urban area	Very large: Over 165,000 students across seven campuses.	Limited: WESI is the “signature program” of a new Women’s Institute.	North Campus serves high minority and substantial non-English speaking students; 61% of students are part time.	Unemployment slightly over 5%. Expanding sectors include hospitality, health care, finance, IT, logistics.
Santa Fe College (FL)	Small city/ urban area	Medium: 22,043 students across seven locations.	Substantial experience serving displaced homemakers and BTW50+ Classic; was early member of AACC +50 Initiative.	About 500 students are over 50 years of age; most of these attend part time.	Unemployment around 4%. Slow recovery from recession, high rate of poverty. 50% of employment is in education or government
Santa Fe Community College (NM)	Small city with rural fringe areas	Smaller: 15,000 students including credit, non-credit, and continuing education.	Was a BTW50+ Classic site.	Targets Native American and Hispanic women with strong cultural ties; 30% of students are age 45+.	Unemployment rate around 5%, remains high for 50+ women of color (20%). Income disparity is pronounced, with high poverty rates in targeted communities.

Three of the six colleges had experience targeting services to older women students as a result of prior participation in the Back-to-Work 50+ Classic program. Three of these schools also had a track record of prior programs that targeted women students—EFSC, SFC-FL and JSCC had operated programs for displaced homemakers; JSCC also had experience operating a short-term training program targeted to single mothers. This program led to the development of a non-credit workforce education division that provided a strong set of short-term training options on which BTW50+: WESI could draw for job candidates.

Several of the participating colleges did not identify particular local target groups for their programs in advance. These schools were open to serving whatever students responded to the outreach and marketing for the program and met the enrollment priorities established by AARP Foundation. Local demographic and economic conditions led other schools to target particular subgroups they anticipated would particularly benefit from the program. These subgroups included underserved racial and ethnic groups, such as Native American and Hispanic women with strong cultural ties at SFCC-NM, and individuals at EFSC, SFC-FL, and SFCC-NM with a history of working in low-wage jobs and living under the poverty level.

The overall local economic situation for most sites has improved substantially since the Great Recession; most of the colleges are in local areas where the unemployment rate was around 4 or 5 percent. The local economy in ACC's location of Austin, Texas, was particularly vigorous, with a very low unemployment rate between 2 and 3 percent. The traditional wisdom is that demand for community college services declines substantially when the economy is tight, because the low unemployment rate puts upward pressure on wages, and most individuals can find employment. In the remaining areas, the economic recovery had not yet reached individuals with very low wages, and significant pockets of poverty remained, particularly among older women workers.

Despite these variations in the local college context, all the participating colleges were selected by AARP Foundation for funding because they were assessed as having a strong commitment to the goals of BTW50+: WESI at the highest levels of college administration, and as having the capacity to partner with the Foundation to realize the program model.

The BTW50+: WESI Evaluation

AARP Foundation engaged Social Policy Research Associates (SPR) to design and implement a unified subgrantee evaluation across all participating community colleges. The evaluation is anticipated to yield a moderate level of evidence about the impacts of the BTW50+: WESI program model (based on SIF's evidence tiers). The evaluation comprises three components:

- The **implementation study** is designed to describe and assess the program's fidelity to the prescribed model, implementation challenges, and best practices. Much of the data collection for the implementation study occurs during annual site visits to each participating college. Details on the research methods used in the implementation study are described on the following page.

- The **outcomes study** is measuring service intensity and participant outcomes using two data sources: the program's electronic client profile and management system (Foundation Impact System) and telephone surveys of job candidates at three months, six months and 12 months after program enrollment. Specific self-reported outcome measures include post-program employment rate, post-program average earnings, changes in financial capability, computer use attitudes, and quality of life. For job candidates who enroll in training, it also includes completion of training.

- The **impact study** will use propensity score matching to create a comparison group using administrative data from state unemployment insurance (UI) data and Workforce Innovation and Opportunity Act (WIOA) program data. To ensure that the projects and services had reached a mature state, enrollment of job candidates into the impact study did not begin until August 2016, about one year after the initial project start-up. The matched comparison group will have access to standard job search support services available through the public workforce system. Although WIOA services can include career information and guidance, referral to needed support services, and access to occupational skills training, comparison group members will not necessarily receive a comprehensive sequence of services and the services they do receive might not be customized for the needs of either older workers or women. This group will be compared with BTW 50+: WESI job candidates on three key measures: post-program employment rate, post-program average earnings, and, for training participants, completion of training.

The Implementation Study

As the first phase of the evaluation, the implementation study is designed to describe and assess the program's fidelity to the prescribed model, as well as to document implementation challenges and emerging best practices.

The current report is an interim report of implementation findings from site visits conducted during the first two years of program implementation. This report also draws on ongoing telephone surveys completed with BTW50+: WESI job candidates three months after program enrollment. A final implementation report will discuss plans for sustaining the program model, analyze data on service receipt, and explore job candidate attitudes measured through three-, six-, and 12-month follow-up telephone surveys.

Implementation Study Research Questions

One of the important functions of the implementation study is to document the key features of the program model being tested in the impact study so that the evaluation team can interpret and identify lessons from the impact study findings. For example, if the impact study shows that the program has (or does not have) statistically significant impacts for BTW50+: WESI participants compared to members of the matched comparison group sample, understanding the following issues will be important to determining the implications of these findings:

- What are the key features of the BTW50+: WESI program model as intended by AARP Foundation, and to what extent have subgrantees achieved fidelity to this model, as measured through a standardized fidelity assessment checklist?
- How does BTW50+: WESI, as implemented by subgrantees, differ from the services available to comparison group members through the public workforce system and other available resources? [3]
- What challenges have the participating colleges encountered as they have implemented the BTW50+: WESI model?
- How do the different colleges vary in their service designs, community partnerships, and institutional commitment to providing "generationally relevant" services to individuals 50 and older?
- How do subgrantees develop local partnerships that allow the project to leverage community resources to connect candidates with supportive services and job opportunities?
- What skills and experience do BTW 50+: WESI staff members need to be effective in serving older workers?
- To what extent do sub-grantees target different subsets of job candidates, such as women who have experienced economic hardship as a result of limited work experience or long spells of unemployment, women with limited English language or literacy skills, or women over 60 years of age?
- How have BTW 50+: WESI job candidates responded to the program? [4]

Additional implementation study research questions specified in the evaluation plan approved by the Social Innovation Fund will inform later phases of implementation study research. By the end of program implementation, the evaluation will also be able to provide important information about challenges and promising practices, from which sites interested in replicating the BTW 50+: WESI model can learn. Questions important to program improvement, sustainability, and replication include the following:

- What do subgrantees identify as their greatest accomplishments and strengths and what do they describe as their greatest challenges in achieving the goals of BTW 50+: WESI?

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[3] This research question originally asked about services available "through the public workforce system and other on-campus resources," but has been broadened to incorporate "other available resources" based on the fact that one subgrantee used a community partner to offer some elements of core services.

[4] This research question was added to the original list of implementation study research questions based on the Social Innovation Fund's guidance on including responsiveness as a dimension of program implementation.

- What do job candidates identify as the most valuable components of BTW 50+: WESI services? [5]
- To what extent do subgrantees have the internal capacity and commitment to offer effective training services to the 50+ population after the conclusion of the grant period?

Implementation Study Methods

Annual site visits to each community college (two of which have been completed at the time of this report) will document program implementation through (1) semi-structured interviews with program staff and partners; (2) observations of program activities; (3) focus groups with job candidates; and (4) completion of a standardized assessment tool to track fidelity to the program model. The second implementation site visit also included a visit to a local American Job Center within the program's service area to document the services available to comparison group members through the public workforce system.

Issues addressed during the implementation study visits include project organization, operations, and fidelity to the intended program model, as well as challenges encountered and the refinement of the program model over time in different sites. Exhibit I-4 shows how the topics covered during the data collection will evolve over time as the project matures and job candidates move through different stages of program participation.

Exhibit I-4: Data Collection Methods and Selected Topics Across Implementation Site Visits

	Early Implementation Site Visit	Mid-Implementation Site Visit	Late Implementation Site Visit
Semi-Structured Interviews	College and local context, design and delivery of program, recruitment and enrollment	Core service, training, job placement services, successes and challenges with program implementation	Lessons learned, program sustainability, and next steps
Focus Groups	Discussion with participants in coaching	Discussion with participants in training	Discussion with participants who are now employed or job searching
Program Observations	Program orientation, if schedule allows	Core services (a coaching session or financial capability training, for example)	Job search skills training

[5] This research question originally asked about job candidates' perspectives on both components of BTW50+: WESI and on other services received at the college. The research team modified this question to ask specifically and exclusively about BTW50+: WESI, as the actual implementation of the model focused less on enrollment in other community college programs than anticipated.

	Early Implementation Site Visit	Mid-Implementation Site Visit	Late Implementation Site Visit
Formal Assessment of Program Fidelity	The same fidelity assessment tool will be used across visits, but sites will likely progress from earning the score “Not yet implemented,” to “Partially implemented,” to “Fully implemented” for various elements.		

To answer the research questions described earlier, the evaluation team developed a fidelity assessment tool to document subgrantee progress toward achieving fidelity to the BTW50+: WESI program model during each site visit. The fidelity assessment tool specifies the critical components of the model and describes what particular practices would have to be in place in order for a local program to achieve fidelity to these key components. The evaluation team did not expect all sites to meet all operational criteria at the time of the first site visit; instead, program fidelity was expected to increase over time, both overall and for specific components of the model.

As described in Exhibit I-5 below, the fidelity assessment (included as Appendix B of this report) draws substantially on the key components described in AARP Foundation's BTW50+: WESI Playbook. Chapter 4 of this report details the fidelity framework for each component of the program model and the progress toward achieving program fidelity as of the end of the second implementation study site visit.

The fidelity assessment tool is used as a formal guide to ensure consistency in how site visitors evaluate each college's progress towards achieving the required core elements. Prior to each round of implementation study site visits, site visitors receive training in how to use the fidelity assessment tool to promote inter-rater reliability. At the end of each visit, the site visitor meets with the program director to discuss how the college is addressing each of the criteria in the fidelity assessment tool. Based on data collected during the site visit, the site visitor rates the subgrantee as having "fully implemented," "partially implemented," or "not yet implemented" each element of the program model.

As used in the implementation study, the fidelity assessments are "point-in-time" ratings of the extent to which the colleges have achieved full implementation and fidelity with the BTW50+: WESI model. They are intended to identify program elements that AARP Foundation might need to pay attention to in providing technical assistance and training to the participating colleges. As such, the tool and fidelity ratings based on the tool do not contain specific thresholds, but rather allow the site visitor to indicate progression in a qualitative manner over the course of the implementation study.

Measuring Fidelity Throughout the Implementation Study

In assessing program fidelity to prepare for impact studies, key considerations include: (1) *overall adherence*, or whether the program includes the key elements of the intended program model; (2) *quality of intervention*, or whether the program has developed and delivers "high quality" services; (3) *dosage*, or the level of participant exposure to program services; and (4) *differentiation*, or whether the intervention being studied differs substantially from baseline services or "business as usual."

This interim implementation report focuses on overall adherence and quality of intervention, and also documents differentiation as measured through visits to local American Job Centers. The final implementation report will also take into account the intensity and duration of services provided as part of the specific program design, as well as the level of participation of individual job candidates.

Exhibit I-5: Key Elements of the BTW50+: WESI Model: Fidelity Checklist

Program Elements	Criteria for Fidelity Checklist
Key Element 1: Initial Assessment and Career Coaching	
1.1	Coaching provides a sequence of activities that help job candidates assess their skills and interests, identify transferable skills, and focus on career paths they want to pursue.
1.2	Coaching provides the support necessary to build job candidate confidence.
1.3	Coaches link candidates to appropriate supportive services and outside resources to help them achieve their employment and training goals.
Key Element 2: Assessing Baseline and Upgrading Computer Skills	
2.1	The computer skills training is tailored to the needs of each job candidate specifically and older workers generally.
2.2	The curriculum of the computer skills upgrade is flexible and geared towards both job search and workplace needs.
Key Element 3: Financial Capability Building	
3.1	The financial capability building component includes best practices from Finances 50+, such as being interactive, and is geared towards the needs of job candidates who are 50 or older.
3.2	The financial capability building component is contextualized within the local community and takes advantage of its resources.
Key Element 4: Enhancing Job Search Skills	
4.1	Career coaches are able to provide job candidates with targeted advice about job searching, have developed relationships with local employers, and are knowledgeable about recruitment, screening, and hiring practices of local employers in the occupations of interest to job candidates.
4.2	The program provides its own targeted support for job placement/job search skills training that is tailored to the needs of job candidates.
Key Element 5: Encouraging Employers to Engage with Job Candidates	
5.1	The program engages in employer outreach and education activities to inform local employers of the value of the 50+ workforce and BTW50+: WESI job candidates and provides opportunities for job candidates to have contact with local employers.
Key Element 6: Academic Advising and Arranging Occupational Skills Training	
6.1	Training options are both tailored to the needs of the job candidate population and broad enough to give them adequate choice.
6.2	Support is provided to job candidates in training and is tailored to their needs.

Report Roadmap

To document program implementation experiences during the first two years of the grant, the next chapter of this report describes project management, staffing, and the development of local partnerships. Chapter III describes recruitment and enrollment, while Chapter IV provides a summary of the design and delivery of services to job candidates and the fidelity of these services to the intended model. Chapter V explores the job candidate perspective, and finally, Chapter VI summarizes lessons learned and future plans based on implementation experiences to date.

Chapter II: Program Management, Funding, and Staffing

This chapter describes the guidance, oversight, and management of BTW50+: WESI, both at the initative level through AARP Foundation and the American Association of Community Colleges and at the subgrantee level through the six community colleges implementing the program. It also describes how subgrantees have funded and staffed their programs.

Key Findings

- **AARP Foundation provides significant technical assistance to subgrantees and channels for facilitated communication among subgrantees on best practices.** The foundation facilitates a learning community that includes regular one-on-one and group conference calls, regular monitoring visits, an online collaboration platform, and an annual in-person Learning Exchange.

- **The program's database, the Foundation Impact System (FIS), has been challenging for subgrantees to use, despite technical assistance and attempts to streamline data entry.** In response to subgrantee feedback, AARP Foundation has developed a user guide and webinars in addition to providing in-person technical assistance during site visits. However, subgrantees still struggle to use the FIS for internal program management and feel that the system could be more user-friendly.

- **At the subgrantee level, most programs use a shared leadership approach in which strategic oversight and daily program management are shared between two or more individuals.** This setup enables subgrantees to have one person focus on compliance while a second focuses on program delivery and ensures overall program quality.

- **The Social Innovation Fund grant's cash match requirement has been challenging for subgrantees.** Subgrantees are required to provide a 1:1 cash match to their subgrant amount in order to receive reimbursement for grant expenses. This necessitates significant staff time and attention beyond what subgrantees had expected, despite all having prior experience operating federal grants.

Program Management

BTW50+: WESI management occurs at two levels: guidance and oversight is provided by AARP Foundation at the intermediary level, and program leadership is provided at the subgrantee level.

Intermediary-Level Management

As the intermediary for the SIF grant, AARP Foundation (supported by the American Association of Community Colleges) provides oversight and technical assistance to subgrantees on program implementation. While AARP Foundation is the recipient of the SIF grant and manages its operation, the Foundation decided to engage the American Association of Community Colleges (AACC) as a strategic partner given AACC's knowledge of the community college landscape. AACC's primary day-to-day involvement in the initiative is through the program manager for BTW50+ (both BTW50+: WESI and Classic), who is employed by the American Association of Community Colleges. The program manager conducts one-on-one calls with subgrantees to stay abreast of concerns and troubleshoot program management and service delivery issues. These calls occurred weekly during the first several months of each subgrantee's implementation, and monthly thereafter. The program manager also conducts annual monitoring visits to each college to ensure that subgrantees are following required procedures for AARP Foundation and the SIF grant as documented in the Playbook, as well as to observe program operations and address any challenges with enrollment, service delivery, and partnerships.

In addition to these targeted technical assistance activities, AARP Foundation facilitates activities aimed at promoting cross-site learning and sharing. For the first two years of the grant, AARP Foundation also held two monthly calls: one for BTW50+: WESI subgrantees only and one for the entire BTW50+ network (both BTW50+: WESI and Classic programs). The BTW50+: WESI calls were discontinued at the end of 2016 based on feedback from subgrantees that such frequent calls were no longer necessary. BTW50+ network calls still take place once per month; these calls provide opportunities for the Foundation to provide updates on new forms, procedures, and resources, as well as time for local programs to share best practices in areas such as recruitment and engaging employers and community partners.

For cross-program sharing between calls, AARP Foundation maintains a site for all BTW50+ programs on BaseCamp, a collaboration platform that allows members to communicate with each other, share links and files, and access key documents such as the program Playbook, the 7 Smart Strategies workshop PowerPoint presentation, recordings of conference calls, and recordings of SPR's evaluation trainings on data quality and informed consent. This site was created in response to subgrantee feedback during the first implementation study site visit requesting more opportunities for peer sharing and collaboration.

The subgrantees gather each January for an in-person Learning Exchange, timed to occur just before AACC's annual Workforce Development Institute, and the Foundation subsidizes registration and conference attendance for two staff members from each subgrantee. This daylong meeting enables subgrantees to discuss evaluation findings (from site visits and participant surveys) and strategize on program implementation plans for the year ahead. For example, during the first Learning Exchange, after reviewing evaluation findings on variations in the use of assessments to inform computer skills upgrade training, subgrantees discussed their approaches to finding and customizing curriculum resources. Based on ACC's experience using Lynda.com to develop video training playlists (discussed in more detail in Chapter IV), AARP

Foundation subsequently supported the purchase of 12 Lynda.com licenses for each subgrantee.

Another program management function for AARP Foundation is training and support on data entry and data management practices. Subgrantees enter participant service and outcome data into the Foundation Impact System (FIS), a Salesforce database designed and maintained by AARP Foundation. These data include attendance at workshops and coaching sessions, completion of core services, and achievement of key milestones such as completion of training and placement into employment. The FIS uses a data visualization add-on called Birst to produce performance measure reports by subgrantee that show progress towards key goals in recruitment, enrollment, completion of core services, connection to training, and placement in employment.

To assist subgrantees with data entry and navigation of the system, each subgrantee has an assigned FIS analyst at AARP Foundation who provides technical assistance and reviews data for quality issues. AARP Foundation also provides FIS technical assistance through a user guide, in-person training (during monitoring visits), and a webinar to subgrantees, including recorded modules developed in response to subgrantees' feedback on the need for such assistance.

AARP Foundation created these video training modules in response to subgrantee feedback during the first implementation study site visit that the FIS was challenging to navigate. The modules cover topics such as recording coaching sessions and entering key milestones in training and employment. To facilitate use of this data for the evaluation, SPR has provided webinar trainings to both the FIS analysts at AARP Foundation and directly to subgrantees on best practices in data quality, emphasizing the importance of FIS data entry being accurate, complete, and timely.

Subgrantee-Level Management

At the subgrantee level, BTW50+: WESI programs have several notable management and structural features. As shown in Exhibit II-1, subgrantees vary in (1) the location of the program within the college, and (2) the leadership structure and division of labor for program management.

Exhibit II-1: Structure and Management Characteristics of BTW50+: WESI Programs

	Location of BTW50+: WESI Within Community College	Leadership Structure and Division of Labor
ACC	Academic support division	A **grant lead** provides strategic guidance and monitors spending; a **program director** provides daily oversight of coaches and ensures the quality of core services delivery.

	Location of BTW50+: WESI Within Community College	Leadership Structure and Division of Labor
EFSC	Career planning and development center	One **program manager** provides oversight of the grant and collaborates with a **staff member** at the American Job Center to implement WESI across the two organizations.
JSCC	Workforce and continuing education division	One **project director** provides oversight of program activities.
MDC	Academic affairs division	Two **grant leads** share oversight of spending and strategic guidance; a **program manager** oversees daily program implementation.
SFC-FL	Student affairs division	A **project director** provides strategic direction and oversees the program; a **project manager** oversees daily program implementation.
SFCC-NM	Academic support division	A **project director** is responsible for administrative oversight and staffing; a **program manager** leads core services delivery and oversees coaches.

As shown in the first column, one program (JSCC) is located within the workforce and continuing education division of its subgrantee community college, and three (MDC, ACC and SFCC-NM) operate within academic support divisions. The remaining programs, EFSC and SFC-FL, are housed in the college's career planning and development center and student affairs division, respectively. EFSC's program also has close ties with their American Job Center, which houses some of the career coaches, while the student affairs division at SFC-FL operates out of the office of the college president and has strong relationships with both the academic support and workforce and continuing education divisions of the college. The program's location has important implications for staff experience and skills, as discussed in more detail later in the chapter. In particular, coaches in academic support divisions bring experience in providing guidance on training and connections to campus resources, while those in workforce and continuing education divisions bring experience with interest assessments and job search assistance.

In terms of leadership structure and division of labor, five out of six subgrantees use a shared approach, wherein multiple individuals split management responsibilities. For most of the subgrantees, this setup enables them to have separate individuals responsible for strategic direction and daily program management—an important distinction given the heavy administrative oversight requirements for the SIF grant (described in more detail below). At EFSC, however, some aspects of program leadership are shared primarily to ensure separate contacts at both the community college and the American Job Center, which assists with the provision of core services.

Program Management Challenges and Successes

Both subgrantees and AARP Foundation noted that the initiative has been working hard to respond to subgrantee concerns. For example, they have increased the amount of and modes for FIS technical assistance, created the BaseCamp site to facilitate communication, and structured the in-person Learning Exchange to allow opportunities for conversations between subgrantees—moving, for example, from an all-day presentation to a series of shorter presentations followed by breakout discussions. This has enabled subgrantees to provide suggestions for program improvement and experience the application of their feedback while the program is still ongoing, thereby increasing commitment to the project learning community envisioned in AARP Foundation's proposal to the SIF.

A key program management challenge for AARP Foundation has been keeping cross-program exchange and technical assistance relevant to subgrantees at very different points of implementation: Two of the subgrantees began implementing the program a full year later than the other four; half of the subgrantees had implemented BTW50+ Classic previously while half had not; and two subgrantees had leadership transitions partway through implementation. Subgrantees that are newer to implementing the program and/or have experienced leadership transitions have very different technical assistance needs than those with more experience and consistent staffing. This difference can make it hard to structure cross-program sharing in a way that resonates for all subgrantees. In particular, highlighting best practices to the network can be a sensitive issue when certain colleges are repeatedly noted for their best practices.

Another challenge noted by both subgrantees and AARP Foundation is that despite increased technical assistance, the FIS is still not seen as a user-friendly system for tracking participant outcomes. According to a member of the leadership team at AARP Foundation, subgrantees "didn't come in with the expectation of daily data entry, like other [organizations] we work with—like keeping track of individuals in an intensive case management way rather than keeping track of grades on a semester basis." FIS data entry has therefore been more time-consuming than anticipated by subgrantees, and it requires more technical assistance than anticipated by AARP Foundation.

Subgrantees echoed that, despite AARP Foundation's efforts to improve training on the system, the FIS remains "messy" and "not quite there." One subgrantee even maintains its own database for participant tracking and re-enters data into the FIS in response to perceived inadequacies in the FIS. In particular, subgrantee staff do not have the right permissions to correct errors in participant names and contact information,[6] which means they have to wait for an AARP Foundation analyst to do so and "the FIS isn't reflecting reality" until that can happen.

Finally, despite efforts to create community via BaseCamp and the Learning Exchange, subgrantees are still eager for connections with one another outside of those arranged and facilitated by AARP Foundation. One program director wished she could visit other subgrantees

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[6] Names and contact information are populated by AARP Foundation's call center. This is described in more detail in Chapter III.

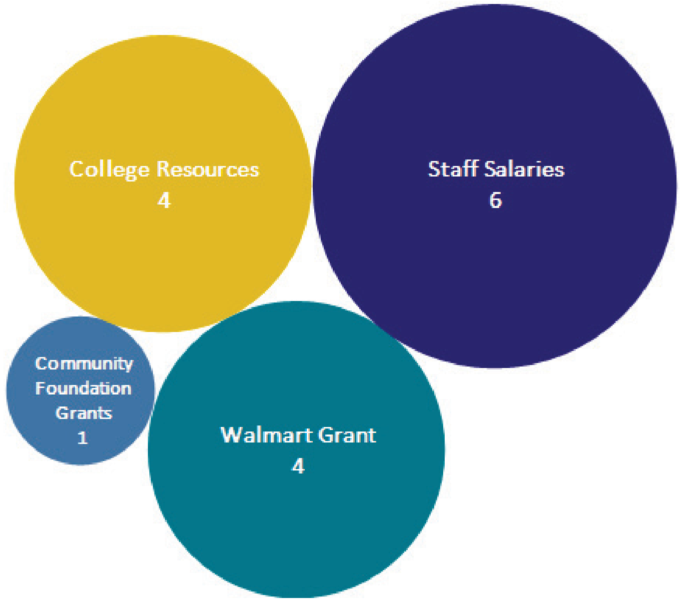
to “actually see another person’s program—we don’t want something glossy and beautiful, we want to know how people solve problems.” She noted that such visits have been helpful in her work as part of a Trade Adjustment Act Community College Career Training (TAACCCT) consortium, a grant program most subgrantees have been part of, where colleges get to visit one another’s programs for quarterly meetings and develop a better sense of local context and on-the-ground challenges.

Funding

To support the development and operation of BTW 50+: WESI, AARP Foundation received a $3 million SIF grant (with a $3 million cash match from the Foundation’s unrestricted funds), with the expectation that $1 million would be spent in each of the three grant years, $800,000 of which would be distributed through annual subgrants to each of the six community college subgrantees.[7] As part of the SIF subgrant agreement, subgrantees are required to provide a 1:1 cash match to their subgrant amount. As shown below in Exhibit II-2, subgrantees are providing this cash match primarily via staff salaries, for both college staff and partner agencies such as the local American Job Center for EFSC, and college resources, such as grants from colleges’ internal foundations. While leveraging community resources is a primary goal of the SIF grant, most subgrantees are not yet doing so, with the exception of SFC-FL, which has secured grants from a local foundation as well as a local scholarship fund. To help colleges meet the cash match requirement, during the second year of the grant AARP Foundation offered the opportunity for subgrantees to receive a portion of a national Walmart Foundation grant for operating expenses that could be counted towards the cash match. Four of the subgrantees (ACC, EFSC, SFC-FL, and SFCC-NM) took advantage of this opportunity and used Walmart Foundation funding to support their programs.

[7] After the close of data collection for this report, AARP Foundation also released an application for continuation funding for the remainder of the implementation period through February 2019. Five of the six subgrantees chose to pursue this additional funding.

Exhibit II-2: Sources of Subgrant Cash Match, By Subgrantee



Funding Challenges and Successes

A common theme of feedback from the intermediary and subgrantee level is that fulfilling the requirements of the SIF grant has been more time-intensive than planned. While subgrantees all had previous experience operating federal grants and meeting the associated compliance requirements, the particular requirements of the SIF cash match are a new experience for them. One AARP Foundation staff member reflected that "colleges didn't truly understand what they were getting into because the [SIF] requirements are so unique." One particularly challenging aspect of the grant structure for subgrantees is that they are reimbursed for actual expenses only after they have demonstrated the required cash match for these expenses. This means that they must (1) allocate significant staff time and attention to sustaining the program *while* implementing it, and (2) carefully organize spending of the grant funding to coincide with the availability of matched funding. One subgrantee program director explained, "the money is there, but how we account for it is hard."

The community college context has also posed a challenge for program funding and sustainability. Both subgrantees and AARP Foundation staff pointed out that many colleges have experienced or are anticipating budget cuts due to reductions in state funding, which translates into institutional resources being significantly more limited than they were when the grant was first awarded. This reduction in resources has implications for both availability of funds for staff salaries (a key source of the SIF cash match) and institutional support for the initiative, given the administrative and compliance requirements of the grant relative to its size.

Staffing

Program staffing represents another important point of variation in the local implementation of BTW 50+: WESI. Key differences across subgrantees include:

- **Number of coaches.** The number of career coaches varies, as does whether the program manager also plays a coaching role. The number of BTW50+: WESI career coaches varies by subgrantee: At the time of the second implementation study site visits, subgrantees had between one and five dedicated individuals playing the career coach role. For subgrantees with only one dedicated coach, the program manager also carries a small caseload; subgrantees with more than one designated career coach generally have the program manager focus on program management rather than direct service provision. Because many career coaches also have other responsibilities—either for BTW50+: WESI or at the community college—the number of official full-time equivalent (FTE) staff providing coaching services is smaller than the total number of individual coaches, ranging from about 1.0 FTE to 3.0 FTE. However, career coaches from one subgrantee noted that, in reality, they spend more time on BTW50+: WESI than their formal FTE assignment would imply.

- **Career coach background**. As discussed earlier, the BTW50+: WESI program is housed in different divisions within the subgrantee community colleges, which influences the different types of expertise and experience offered by career coaches. For example, career coaches in programs housed in academic support divisions tend to be especially familiar with tutoring and similar resources, while coaches at programs housed in workforce development divisions tend to have experience conducting interest inventories and connecting students to employment. Since EFSC and JSCC use career coaches who are employed by the local AJC, these staff members bring knowledge of the local workforce system, experience using labor market information, and an understanding of other local workforce development and training programs.

Staffing Challenges and Successes

One success to note in program implementation to date is that, consistent with the program model described in Chapter I, subgrantees have worked hard to ensure that staff members are sensitive to the needs of and relatable to the target population. Most subgrantee staff members who work with job candidates are female, many are themselves are approaching or are over 50 years of age, and subgrantees in communities with large Spanish-speaking populations have at least one coach who is fluent in Spanish. Additionally, many of the career coaches noted that they feel a connection with job candidates due to their personal experiences with unemployment and re-careering at midlife.

Subgrantees reported several challenges to staffing BTW50+: WESI. First, as a requirement of the SIF grant, all staff members working on the grant had to go through background checks prior to receiving a formal employment offer. This delayed onboarding of new staff due to limited capacity at the community college level to conduct such screenings. Additionally, because most subgrantee staff do not work full time on the BTW50+: WESI program, staff members find it challenging to balance their responsibilities to other programs with their responsibilities to the BTW50+: WESI grant. This is particularly challenging given the time requirements of managing grant compliance—such as daily data entry, performance reporting, and participation in monitoring activities—and, for career coaches, serving a population that often requires more attention than traditional-aged students. Finally, several subgrantees have experienced staff turnover during early implementation, both at the leadership and coaching level. Turnover at the leadership level has enabled these subgrantees to re-examine and adjust their programming, but these programs now are pressed to achieve a well-developed and mature program model within the time limits of the subgrant period.

Synthesis and Conclusions

Early implementation of BTW50+: WESI has been defined by adjustment to the requirements of the initiative: subgrantees have had to screen and hire (and in some cases, replace) staff members, secure and sustain matched funding, and learn to use a database still evolving to be useful for on-the-ground program management. AARP Foundation has provided significant support during this period, some of which was developed in direct response to subgrantee feedback. During later phases of implementation, it will be important to document how technical assistance needs—specifically, the challenges of achieving compliance with a complex federal grant—evolve with more experience operating the program.

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Chapter III: Recruitment, Eligibility, and Enrollment

Introduction

To meet their enrollment goals, subgrantees conduct recruitment and outreach with the target population of women ages 50 to 64. They then screen, select, and enroll eligible job candidates from the interested pool. This chapter first describes the BTW50+: WESI recruitment and outreach model, including marketing and outreach tools, interactions with the AARP Foundation call center, and the 7 Smart Strategies workshop. It then discusses the details of the program's eligibility, selection, and enrollment processes. It concludes with overall challenges and best practices related to recruitment, eligibility, and enrollment.

Key Findings

- **Subgrantees strive to achieve a balance between relying on AARP Foundation outreach materials and customizing materials to make them appropriate for the local context.** Specific customization practices include targeted outreach to special populations in the community and experimenting with new modes of outreach such as bus wrap ads and short videos for social media sharing.
- **Similarly, while all subgrantees adhere closely to workshop materials provided by AARP Foundation for their 7 Smart Strategies information sessions, they use their understanding of the communities they serve to choose times and locations for these sessions that will maximize attendance.** Some subgrantees hold workshops on a regular monthly or quarterly basis, while others schedule them for just prior to new job candidate enrollment. Subgrantees have also varied the location of these workshops to ensure that applicants from all over the local area can attend.
- **Due to the smaller than expected number of applicants, most subgrantees report that BTW50+: WESI enrolls most applicants**. Because of this, the selection rubric provided by AARP Foundation is used more as a general guide than a determining factor for program acceptance.

Recruitment and Outreach

Subgrantees must conduct recruitment and outreach that reaches the intended BTW50+: WESI population. To assist with this process, which targets a different demographic than is typical for community colleges, AARP Foundation created a standardized recruitment and outreach framework. While subgrantees have some flexibility to customize certain components of the model, AARP Foundation offers extensive marketing guidance and tools, administers a call center that represents the first point of contact with the program for most interested job candidates, and provides a standard PowerPoint template for the 7 Smart Strategies workshop, the BTW50+: WESI information session. This leverages the AARP Foundation brand and experience with the eligible population and reduces the burden on individual subgrantees to develop appropriate recruitment and outreach models from scratch.

Exhibit III-1 illustrates the basic BTW50+: WESI outreach and recruitment model from the perspective of a potential job candidate.

Exhibit III-1: Standard BTW50+: WESI Outreach and Recruitment Model

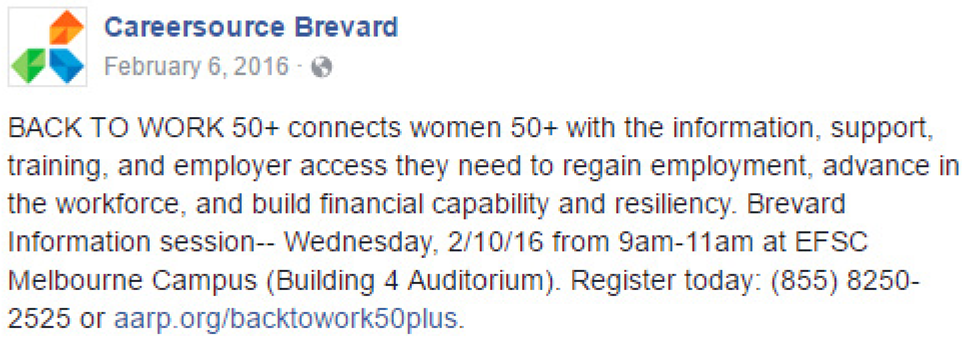
In any location, job candidates first learn about the program from outreach material, word of mouth, or a referral. To get connected to the program, they call the toll-free AARP Foundation call center, through which operators screen for initial eligibility and sign potential job candidates up for the next local 7 Smart Strategies workshop. The call center also mails potential applicants a 7 Smart Strategies guide, which includes program information as well as advice about the job search process.

Marketing and Communications Strategies and Tools

As part of the standardized recruitment and outreach approach, AARP Foundation provides subgrantees with detailed marketing and communications guidance and tools. The Playbook includes suggested messaging, marketing copy, a radio ad script, approved social media posts, grassroots marketing ideas, and a variety of flyers, posters, postcards, and other outreach materials. Messaging highlights the resiliency and strength of the target applicant group and draws potential applicants in with the promise of "tips and tricks" at the 7 Smart Strategies workshop.

In addition to providing this messaging, AARP Foundation also recommends that subgrantees contextualize these tools in their community, such as by conducting their outreach with local partners. For the most part, subgrantees adhere closely to this model and use AARP Foundation guidance and materials as the core of their outreach. Through the BaseCamp site discussed in the previous chapter, AARP Foundation also facilitates the sharing of marketing and communication best practices across subgrantees.

Exhibit III-2: Facebook Post from EFSC partner AJC CareerSource Brevard


Careersource Brevard
February 6, 2016 ·

BACK TO WORK 50+ connects women 50+ with the information, support, training, and employer access they need to regain employment, advance in the workforce, and build financial capability and resiliency. Brevard Information session-- Wednesday, 2/10/16 from 9am-11am at EFSC Melbourne Campus (Building 4 Auditorium). Register today: (855) 8250-2525 or aarp.org/backtowork50plus.

According to program administrators and career coaches, the most effective outreach tools so far include traditional methods, like newspaper and radio ads, as well as social media outreach, especially through Facebook. They noted that some members of the target population still read newspapers and listen to the radio, but that many are also savvy social media users. Staff members from over half of the subgrantees credited word of mouth referrals from other job candidates, college instructors, and BTW50+ Classic participants with boosting their recruitment efforts. In addition, after SFC-FL program administrators reported their success with transit-based advertising on BaseCamp, MDC and ACC also decided to promote BTW50+: WESI using this method. Overall, program administrators and career coaches thought that flyers left at community based organizations had been a less successful recruitment method, perhaps because subgrantees did not always have strong relationships already built with such organizations.

Exhibit III-3: Bus Wrap from ACC

Subgrantee program administrators and career coaches reported mixed feelings about the program's reliance on AARP Foundation messaging and material. On the one hand, some said that the AARP brand attracted people to the program and identified BTW50+: WESI as being connected to a powerful organization. On the other hand, one program administrator worried that the AARP brand could be unappealing to potential job candidates or employers who have negative feelings about aging or who hold stereotypes about older workers. Two program administrators also wished there was more variety in terms of available photographs for outreach and felt that flyers could be streamlined and updated to be "juicer" and more "attention-grabbing." They also noted that by relying on standardized outreach material, it was harder to highlight the program's local flavor.

Recruitment Efforts Targeted to Special Populations

In addition to the broad outreach described above, most of the subgrantees experimented with targeted outreach to individuals they thought would be especially interested in the program. For example, EFSC sent a bulk mailing of program postcards to local women in the target age range who had accessed the AJC website looking for employment. Both EFSC and JSCC mailed postcards to former students in the target group who had dropped out of programs at their colleges before completing them. SFCC-NM initially tried to reach women in a nearby Native American community with a half time Native American outreach coordinator who conducted outreach in the pueblos. While program administrators feel that the targeted postcard mailings have been successful, SFCC-NM program administrators eliminated the Native American outreach coordinator position after it failed to yield many job candidates. They believe that cultural and logistic barriers, such as women needing to take care of grandchildren during the times core services and training are offered, make it difficult for this community to participate in the program or pursue full-time employment.

Interaction with the AARP Foundation Call Center

For the most part, program administrators are satisfied with the call center AARP Foundation administers for connecting interested job candidates to 7 Smart Strategies workshops, especially since it enables subgrantee staff members to focus on providing program services rather than conducting initial eligibility screenings. However, staff members from four subgrantees identified occasional data quality issues with the call center, such as misspelled names, individuals outside of the target age range being signed up for 7 Smart Strategies workshops, and interested individuals being funneled to the wrong 7 Smart Strategies workshops (including those offered by competing BTW50+ operators in the same region). Staff members reported that most of these challenges had resolved over time after they provided feedback to AARP Foundation.

7 Smart Strategies Workshops

As with other components of the BTW50+: WESI recruitment and outreach model, the content for the 7 Smart Strategies workshops is guided by resources from AARP Foundation and takes advantage of the organization's experience providing services to the target population. For example, AARP Foundation provides the subgrantees with detailed planning steps in addition to the PowerPoint presentation to guide the workshops. The workshops are differentiated from many of the other information sessions hosted by the subgrantees or area AJCs in that they are also intended to be a standalone service. Subgrantees are encouraged to provide refreshments and information about local employers during the workshops, and the 7 Smart Strategies guide covers job search strategies that attendees can put into practice even if they do not end up enrolling in the program.

While the subgrantees all adhere to this general structure, there is some variation in the frequency and location of 7 Smart Strategies workshops as well as the extent of the local customization. Four subgrantees schedule 7 Smart Strategies workshops so that they occur soon before the start of each new wave of the program, while the other two offer them on a set monthly or quarterly schedule. Most subgrantees purposefully rotate the location of 7 Smart Strategies workshops so that potential job candidates from different parts of the broader community can attend one that is convenient to them. For the most part, the program administrators and career coaches who lead the 7 Smart Strategies workshops say they closely follow the AARP Foundation PowerPoint. However, some local customization occurs, such as videos shown by EFSC and SFC-FL about manufacturing in the county and prior job candidate experiences in BTW50+: WESI, respectively.

Program staff from most of the subgrantees said that for at least some waves, they have had fewer 7 Smart Strategies workshop attendees than expected. However, program administrators also report strong participant responsiveness, noting that most attendees who attend also complete the application for coaching, which serves as the BTW50+: WESI application. For example, half of the subgrantees reported that over 80 percent of attendees complete an application for coaching, and all of them estimated that over half indicate their interest in this way.

Eligibility, Selection, and Enrollment Process

After filling out an application for coaching at a 7 Smart Strategies workshop, applicants go through an eligibility and selection process before enrolling in BTW50+: WESI. As with the outreach described above, AARP Foundation provides detailed guidance on these components of the program. The following sections describe the eligibility, selection, and enrollment processes including how closely subgrantees adhere to this guidance and where they vary.

Exhibit III-4 illustrates the standard BTW50+: WESI eligibility, selection, and enrollment process. While some subgrantees have built in additional steps, such as holding a selection interview to supplement the information provided in the application for coaching, the three steps outlined below are consistent across programs.

Exhibit III-4: Standard BTW50+: WESI Eligibility, Selection, and Enrollment Process

1

- Applicants complete application for coaching at close of 7 Smart Strategies workshop

2

- Program administrators and career coaches select job candidates

3

- Selected job candidates are notified of status and invited for core services

Eligibility and Selection Process

AARP Foundation designed the BTW50+: WESI program to meet the needs of low-income women age 50 to 64 who are unemployed or underemployed and seeking full time work. According to AARP Foundation, the ideal job candidate has prior work experience but needs skill upgrades or computer training to compete in the current job market. Because the program is intended to prepare job candidates for employment or training in a relatively limited time span, AARP Foundation recommends targeting women who will be able to take advantage of program services right away. For example, job candidates are required to hold a high school diploma or GED so that they already have a solid educational foundation. The Playbook also notes that while job candidates may be facing recent major life changing events like a divorce or the death of a spouse, those with serious housing or mental health challenges are expected to be referred to other programs until they can fully engage in training or a job search. In addition, while BTW50+: WESI is designed to meet the needs of women with the above characteristics, the program cannot legally exclude men or those outside the target age range who are otherwise qualified for the program.[8]

In order to select job candidates who fit this description, subgrantees rely mostly on the application for coaching, which interested individuals complete at the end of the 7 Smart Strategies workshop. This application contains information such as occupations of interest, highest level of education completed, current employment status, work experience, employment goals, interest in BTW50+: WESI program services, and whether personal income is under or over $40,000 a year. To complement this application, career coaches at ACC and EFSC also conduct one-on-one interviews to get a more complete picture of applicants' strengths and needs. EFSC added this additional one-on-one interview during the fifth wave to gauge applicant commitment and to check in on potential challenges with transportation and schedules, two barriers that had historically led to attrition. EFSC career coaches use a pre-screening checklist to help them assess these potential challenges. Beyond this checklist, no subgrantees use additional suitability assessments to select job candidates.

Program administrators and career coaches from all subgrantees meet to select wave members together and use an AARP Foundation selection rubric to do so. This rubric awards one point for each of the preferred criteria listed in the box below.

[8] After the award of the SIF grant, AARP Foundation and CNCS determined that, because the program receives federal funding, it can target women within the desired age group but must be open to all applicants. Marketing materials therefore include a standard disclaimer: "This program is available to all, without regard to race, color, national origin, disability, sex, age, political affiliation, or religion." To date, across subgrantees, nearly all enrolled job candidates have been in the target age range and approximately 10 percent of enrolled job candidates have been men.

AARP Foundation Selection Rubric Criteria

- Interest in in-demand jobs highlighted by this subgrantee
- Educational level between high school diploma/GED and bachelor's degree
- Unemployed or underemployed
- Income below $40,000
- Seeking full-time work
- Not currently receiving job search training
- Previous long-term work experience
- Expressed interest in skills training provided through BTW50+: WESI

Generally, subgrantee staff members try to select job candidates with the highest scores from this rubric. One program administrator said, for example, that she prefers job candidates who meet at least three of the criteria.

Subgrantee staff members have mixed feelings about the BTW50+: WESI eligibility process. On the one hand, they all use the selection rubric and feel it is a helpful tool for selecting job candidates. However, staff members from two subgrantees indicated that they sometimes wish for more flexibility and feel that prioritizing applicants with a preference for full-time work excludes certain groups of otherwise suitable women who may only be able to work part time due to their life circumstances, such as needing to care for grandchildren. Program administrators from these two subgrantees admitted that they have sometimes accepted women who might not quite meet the criteria but who seem like they would otherwise benefit from the program, such as an individual who was above the target age range and another who was already working full time but wanted to transition to another field.

Concerns about program eligibility criteria are somewhat theoretical given that BTW50+: WESI program selectivity is often limited. Staff members from four subgrantees said that for at least some waves, lower than expected number of applicants results in the program accepting most of them. As one program administrator said, "Basically, if someone is unemployed, they're in." The need for job candidates has forced some of these subgrantees to increase the flexibility of their selection process over time. Two subgrantees now enroll women interested in part-time employment since they would not otherwise have enough job candidates to meet their enrollment goals.

On the other hand, program administrators from two subgrantees have experimented with increasing program selectivity to reduce attrition. Program administrators and career coaches from one such subgrantee explained that some of the women they selected for earlier waves had more intensive supportive service needs and may have been better suited for disability or other longer-term programs that provide additional support. Staff from this subgrantee have since started prioritizing women who have been out of work for less than a year and who are clearly able to commit to attending core services. They believe such women are a better fit for the program since they can transition more quickly back into work or training.

Perhaps because of this focus on those with fewer supportive service needs and those who need only limited time to be fully job- or training-ready, two subgrantees noted that their job candidates have been more educated and have had higher incomes than they initially envisioned. For example, one program administrator said that many job candidates already have postsecondary degrees. As discussed in more detail in Chapter VI, this pattern may have implications for the selection of the comparison group for the impact study, as those selected for the program ideally should have similar background characteristics to the comparison group, which will be composed of individuals enrolled in public workforce system programming in the same geographic area.

Enrollment

Across subgrantees, enrollment into the BTW50+: WESI program is a straightforward process. The subgrantee program administrators and career coaches try to complete the selection process quickly so that accepted applicants do not have to wait long between attending the 7 Smart Strategies workshop and officially enrolling in the program. All six subgrantees select job candidates, notify them of their acceptance via email or phone, and begin some form of program services within about a week of the 7 Smart Strategies workshop. According to program administrators and career coaches, most accepted job candidates end up enrolling in BTW50+: WESI, though a few might decline to participate due to unexpected caretaking responsibilities or health issues.

Official enrollment in the program is complete when a job candidate fills out and signs the coaching agreement form, which lays out job candidates' program responsibilities. Often, this is done at the first individual coaching session, though subgrantees may also initially pass out this form in a group coaching session, then have career coaches go over it with job candidates during their first individual coaching sessions. In addition, job candidates who enrolled in BTW50+: WESI in or after August of 2016 are also asked to sign an informed consent form to participate in the impact study.

In addition to the coaching agreement form, ACC, MDC, and EFSC also have all job candidates enroll as students at the college. This involves filling out an additional application form for a continuing education class created with the main purpose of enabling the job candidates to become official students. The other subgrantees only require that job candidates apply for the college if they are enrolling in training there. The benefit of having all job candidates enroll is that they get access to college services and supports such as tutoring, libraries and computer labs, discounted software, and sometimes free public transportation. EFSC, which runs the BTW50+: WESI program in close partnership with its local AJC, also has job candidates register with the state job bank and get a user card for the AJC as part of its enrollment process.

Challenges and Best Practices in Recruitment, Outreach, and Enrollment

As described below, the subgrantees have all confronted challenges and identified best practices with the BTW50+: WESI recruitment, eligibility, and enrollment processes.

Challenges with Recruitment and Enrollment

- **As implemented by the subgrantees, BTW50+: WESI may not offer services that meet the needs of all the women that staff originally hoped to target. This may affect both enrollment numbers and the demographics of who ultimately enrolls.** Subgrantee program administrators and career coaches said that their ability to enroll certain women into BTW50+ WESI has been limited, perhaps because the program does not always meet their needs. For example, staff members from two subgrantees noted they have tried to reach women in the Hispanic community, with one using Spanish outreach material, such as radio ads, in an effort to attract them. However, neither subgrantee offers fully bilingual services, which may limit the program’s relevance for monolingual Spanish speaking women. Program staff from another subgrantee questioned whether the program was culturally competent for Native American women in their area, many of whom have caretaking responsibilities and are thus unable to participate in full-time work. Staff members from several subgrantees reported that a lack of good public transportation in their area can make it harder to reach potentially eligible women in more outlying or rural areas.

- **The local need for services may have been met in some areas.** One subgrantee is facing competition for job candidates from a BTW50+: Classic program that is operating in the same city. Program staff report that the AARP Foundation call center sometimes sends potential applicants to information sessions for the other program even if they have received outreach materials from the subgrantee’s program, and the fact that there are two similar programs may be saturating the demand for services in the local area. Program staff from another subgrantee worry that the declining number of women attending each 7 Smart Strategies workshop could also mean that they have already met the local need for program services.

- **In general, subgrantee program staff noted that BTW50+: WESI is less selective than initially intended.** This is in part because of the smaller than expected number of applicants, perhaps explained by the challenges described above. Because of this, subgrantee program staff cannot give as much weight to the AARP Foundation selection rubric as planned, since they end up accepting most applicants.

Promising Practices in Recruitment and Enrollment

- **For their recruitment and outreach processes, most subgrantees have achieved a balance between relying on AARP Foundation’s guidance and expertise and customizing material for the local context.** While subgrantees generally appreciate the AARP Foundation call center and outreach material, they have also engaged in their own marketing activities, such as creating site-specific videos at ACC and SFC-FL and recruiting through local AJCs at EFSC, JSCC, and SFCC-NM. EFSC and JSCC have also had success conducting targeted outreach to members of their communities who they think would be interested in BTW50+: WESI due to previous enrollment in other courses at the college. In addition, the subgrantees have shared successful outreach strategies with each other, leading to the use of bus wraps by several of them.

- **In an attempt to reach more applicants, subgrantees have experimented with the content and format of 7 Smart Strategies workshops.** For example, EFSC, JSCC, MDC, and SFC-FL rotate the location of their workshops so that they are easy for women in different areas of the community to access. Additionally, SFC-FL and EFSC also hold some workshops at off-campus locations that may be more comfortable for applicants such as senior centers or the local AJC. EFSC and JSCC have also experimented with the time of day when they offer the workshop or plan to do so going forward. By offering refreshments, time for networking, and actual job search tips, the subgrantees have also made the workshops a positive experience for applicants, which is perhaps one reason a high percentage of attendees end up applying for BTW50+: WESI.

Chapter IV: Services Provided to Job Candidates

This chapter describes subgrantees' progress towards implementing the BTW50+: WESI model at the time of the second implementation study visit, the evolution of components during the implementation period, variations in program design and service delivery procedures across the subgrantees, challenges faced and addressed in program implementation, and differentiation of BTW50+: WESI from services available in the absence of the program.

Key Findings

- **Subgrantees have fully or partially implemented most elements of the program model**. Implementation of the career coaching, computer skills training, and job search skills training elements—on which AARP Foundation provided updated guidance and technical assistance between the first and second implementation study visits—show the highest fidelity to the intended model.

- **Subgrantees struggled most to realize full implementation of the employer engagement component of the program model.** This represents a key area in which the public workforce development system services available to comparison group members may be as strong or stronger than what is offered through BTW50+: WESI.

- **Even within elements of the program implemented with fidelity, subgrantees show notable variations in how they deliver these services.** For example, subgrantees show variation in the format and intensity of computer skills training options, and only half of subgrantees offer intermediate level computer skills training classes. Similarly, for occupational skills training, the proportion of job candidates who go on to occupational skills training, and the number and types of occupational skills trainings offered, also vary.

- **Subgrantee familiarity with the target population and with providing similar services is correlated with fidelity of implementation.** Unsurprisingly, prior staff experience with the BTW50+ Classic program model and/or working in the public workforce system appears to strengthen the fidelity with which subgrantees have implemented the program model, both overall and for specific components.

Findings on Overall Fidelity

As described in Chapter I, key elements of the BTW50+: WESI program model include:

- career coaching,
- computer skills training,
- financial capability training,

- job search skills and employer engagement, and
- occupational skills training.

During implementation study site visits, as described in Chapter I, site visitors evaluated fidelity to the above elements of the model. They used a standardized fidelity assessment instrument (included as Appendix B to this report) to rate subgrantees as having fully, partially, or not yet implemented various subcomponents of each element. To ensure consistency in ratings, all site visitors participated in a training during which they evaluated a sample program and discussed any differences in understanding of how to rate fidelity.

Across all subgrantees, average fidelity ratings at the time of the second implementation study site visit show that they have made substantial progress in implementing the key elements of the BTW50+: WESI model. Three of the six subgrantees have achieved close to full implementation of the model across all key program elements, and the remaining three subgrantees have achieved partial implementation of all key program elements. Across all six subgrantees, the highest fidelity ratings were given for career coaching, computer skills training, job search skills, and arranging occupational skills training. On average, subgrantees received slightly lower fidelity ratings on building financial capability and employer engagement.

Remaining sections of this chapter describe in detail the implementation designs and practices used by the subgrantees to implement each of the six key elements, and explore the variations across sites and the challenges they have faced in realizing fidelity to the model.

Career Coaching

BTW50+: WESI career coaches work directly with job candidates to help them achieve their training and employment goals. While AARP Foundation provides overarching guidance, details of the coaching model, such as its staffing, format, and intensity, vary somewhat across subgrantees. For all of them, services are provided through required individual coaching sessions as well as additional group coaching. The component is also closely linked with the other core program services. Career coaches frequently lead cohort coaching workshops on job search skills and link job candidates to other required activities.

Adherence to Career Coaching Model

The coaching component of the BTW50+: WESI model has been well defined by AARP Foundation; its fidelity measure consists of three main elements. Across subgrantees, adherence to the coaching model varies from partial to full implementation. The three elements of the career coaching model, including their subcomponents, are described in more detail below.

1 **The BTW50+: WESI career coaching model offers a sequence of activities to help job candidates assess their skills and interests, identify transferable skills, and focus on the career paths they want to pursue.** In assessing whether subgrantees have met

this model element, site visitors reviewed project design and operations to determine whether:

- Career coaches conduct assessments and skill-and-interest inventories of job candidates starting from the first one-on-one coaching session.
- Job candidates create realistic service plans with achievable goals and update these plans as needs change.
- Career coaches use labor market information (LMI) to make recommendations for appropriate career paths.
- Career coaches encourage job candidates to apply for scholarship support or other programs that could help them achieve their goals.

Three of the subgrantees have achieved full fidelity to this element of the career coaching model, while the other three have made progress toward fidelity but have not yet achieved it. Two of the three that have achieved full fidelity to this element have career coaches who are especially experienced with using LMI, connecting job candidates to other programs, and creating service plans as a result of dual work roles that also include working within the local AJC.

Areas for development noted in the practices of the three subgrantees that have not yet achieved full fidelity include completing formal service plans with job candidates, using LMI to help job candidates make training and employment choices, interpreting assessments with job candidates, and referring job candidates to additional programs for scholarship support.

2

The BTW50+: WESI career coaching model provides job candidates with the support necessary to build confidence. In assessing whether subgrantees have met this model element, site visitors reviewed program design and operations to determine whether:

- Career coaches complete at least one coaching session with each cohort or job candidate.
- Career coaches have experience working with older workers or have had training on how best to serve this population.
- Career coaches conduct case conferencing with other career coaches or staff who work with job candidates.
- Job candidates can meet one-on-one with career coaches to address sensitive issues.
- Job candidates have access to peer support groups to learn from each other.

All but one of the subgrantees have achieved full fidelity to the second element of the coaching model. The sixth subgrantee has met every subcomponent of this element except two: that the program develop peer support groups for job candidates and that all career coaches be experienced in serving older workers or trained on how to work with this group.

3

In the BTW50+: WESI career coaching model, career coaches link job candidates to supportive services and outside resources to help them achieve their employment and training goals. In assessing whether programs have met this model element, the site visitors reviewed program design and operations to determine whether:

- Career coaches conduct supportive services assessments so that they understand job candidates' unique situations and needs.
- Career coaches work with job candidates to develop plans to address barriers to training and work including transportation, childcare, work clothing, books, and uniforms.
- Career coaches have established relationships with primary referral agencies and conduct warm referrals for job candidates to these agencies.

Across subgrantees, fidelity to the supportive services element of the career coaching model varies from not yet implemented to fully implemented, with half of subgrantees falling between those extremes. The three subgrantees that demonstrate partial fidelity to this element have not yet achieved strong referral relationships with supportive services providers. While these three subgrantees do refer job candidates for supportive services, they do not generally have strong enough relationships with outside service providers to check in with them to inform them that a job candidate has been referred or to follow up to see if the job candidate actually received services. The staff of some programs indicated that they do not think such level of scrutiny about referrals is appropriate or necessary; they worry it infringes on job candidate privacy, believe job candidates have fewer supportive service needs than expected and/or have no trouble accessing the services they do need on their own, or think that contacting supportive service agencies on their own is a good learning experience and confidence booster for job candidates.

Evolution of Career Coaching

In response to findings from the first implementation study site visit, in early 2016 AARP Foundation provided clarification on the required elements and intensity of the BTW50+: WESI career coaching model. Under this updated coaching model, subgrantees are now required to offer at least two coaching sessions with each job candidate. AARP Foundation also explained that the two required coaching sessions must be provided to job candidates in a one-on-one format. Most subgrantees have chosen to provide one required individual coaching session near the beginning of core services and one at the end. In this way, job candidates receive personal support in planning their course through the program and then in determining their next steps. One subgrantee invites job candidates to sign up for coaching sessions during core services as needed.

At the beginning of 2016, in addition to clarifying the desired intensity of the coaching model, AARP Foundation also offered additional guidance about how to use LMI when developing job candidate service plans. As noted above, while two subgrantees have career coaches who also work in local AJCs and are thus very familiar with LMI, other subgrantees do not have as much familiarity with it. (As noted in Chapter II, some coaches have an academic advising background but not necessarily a workforce development background.) At least one subgrantee is still working on how to incorporate LMI into service planning, though most subgrantees reported that they now prompt job candidates to think about "hot jobs" with living wages and trainings that lead to jobs that are locally in demand.

Together, these changes to the coaching model were intended to improve the quality of the job candidate experience in BTW50+: WESI. For some subgrantees, AARP Foundation's clarifications on required elements and intensity necessitated significant changes to the coaching model (e.g., to add more individual coaching sessions), while for other subgrantees, it simply codified what they were already doing.

Now that the career coaching model has been clarified, it generally involves two individual coaching sessions bookending the core services period. The first individual coaching session is usually used to review assessments and prepare a service and/or employment plan. The second coaching session is used at the end of core service workshops to identify the next steps for training or job search. Various cohort coaching workshops on topics such as computer skills, financial capability, and effective job search techniques usually occur in between the two meetings with the career coaches. (Later sections of this chapter detail the elements and delivery of these cohort coaching topics.)

Variation Across Subgrantees in Career Coaching Model

While aspects of the career coaching model are clearly defined by AARP Foundation, subgrantees also have some flexibility to shape the implementation of the component. This flexibility has led to variations in coaching services. Elements of the career coaching model that vary across subgrantees are described in more detail in this section.

Assessments and Service Plans. Per the BTW50+: WESI model, job candidates start the coaching component by completing assessments and interest inventories. They then go over the results with career coaches during goal setting and service planning. Career coaches are also instructed to use local labor market information during this process. Four subgrantees have job candidates take two assessments during the beginning of career coaching:

- the interest inventory from AARP Foundation's Virtual Career Network (VCN) and
- the Northstar Digital Literacy Assessment.

VCN Interest Inventory Occupational Themes

- Realistic
- Investigative
- Artistic
- Social
- Enterprising

The interest inventory allows job candidates to determine which occupations would be a good fit for their personality. Informed by these assessment results, job candidates fill out a "Jobs that Match My Interest" form with the career coach. The form organizes information about the selected jobs, including the type of education and computer skills needed, projections for job growth, typical wages, and local employers. It also prompts job candidates to think about the next steps they would need to take to prepare for employment in this occupation, like enrolling in related training or researching a certain employer. Only one subgrantee did not report using any formal assessments with job candidates. (Information about the Northstar Digital Literacy Assessment, which is used to assess need for computer skills training, is described in more detail in another section of this chapter.)

In addition to going over interest inventory results and discussing potential supportive service needs, career coaches from three of the subgrantees also use the first coaching session to prepare a written service plan. The level of formality of this document varies by subgrantee, but career coaches in two programs use the Foundation Impact System (FIS) to track job candidate goals and plans. In general, service plans include tasks such as developing a resume, enrolling in training, or reaching out to a community organization for supportive services, as well as a deadline by which the goal should be met. The subgrantees that do not develop a formal individualized service plan during the first coaching session do this later, once a job candidate's goals have crystalized, or they have less formal ways of tracking a job candidate's goals, (e.g., by listing them in a Word document). Career coaches from one subgrantee simply discuss the job candidate's plans for the program as she signs the job candidate/coach agreement form.

Coaching Content. Beyond the initial service planning typically accomplished in the first individual coaching session, BTW50+: WESI career coaches stay in touch with job candidates throughout core services to boost their confidence and connect them to training, employment opportunities, and supportive services. As of the second round of implementation study site visits, career coaches from most subgrantees said they often meet individually with job candidates more than the two times required in the service model. A career coach from one subgrantee suggested that six individual sessions seems more appropriate given job candidates' needs.

Exhibit IV-1 below illustrates the roles career coaches most commonly play.

Exhibit IV-1: Career Coach Roles

Service Planning	Confidence Boosting	Enhancement of Job Search Skills	Connections to Other Services
• Assessments • Interpreting LMI • Documenting goals for training and employment	• Sharing success stories • Offering encouragement	• Mock interviews • Resume assistance • Job application tips	• Scholarships • Referrals for supportive services • Creating cohort building activities

Career coaches emphasized that they see boosting job candidate confidence as one of their major functions. For example, one said that job candidates often do not believe they can get full-time jobs, so sharing success stories of other women who have achieved this goal can be inspiring. Another added that job candidates can be "totally baffled and discouraged" by today's job search process, especially if they have been out of the labor market for a long time. However, she can provide them with encouragement to complement the more practical BTW50+: WESI services like computer skills training.

Career coaches also help job candidates develop job search skills during individual coaching sessions by conducting mock interviews and assisting them with resume development. Often, these topics are introduced during group job search skills component workshops, and then revisited in more depth as needed during individual coaching sessions. Individual career coaching sessions are also an opportunity for job candidates to check in about their specific job search strategies, such as researching employers they might want to contact.

Finally, career coaches also connect job candidates to supportive services and try to build community among job candidates in each wave to strengthen peer support systems. Three subgrantees are making special efforts to maintain job candidate contact with the program after the end of core services by arranging social events to bring participants together. SFCC-NM, for example, is experimenting with ways to increase social cohesion after the end of core services by creating casual social support gatherings to bring job candidates together. These have included a coffee club and a Thanksgiving dinner. The career coach there said, "Sometimes the people in training have drifted away from their cohort, so [arranging social events] is a way to bring them back in." At EFSC, career coaches are trying to develop programming to make job candidates feel that they are a part of the larger BTW50+: WESI community. They have set up a private Facebook page that job candidates can use to network with each other, although coaches are not sure how much use it gets.

"It's their goals. I listen and help them navigate."

- BTW50+: WESI career coach

Need for Supportive Services. Rather than using formal supportive services assessments, all subgrantees inquire about potential supportive service needs in a more conversational manner. While career coaches emphasized that job candidates need guidance about employment and training, program staff from most subgrantees feel that job candidates do not need much assistance from career coaches to address supportive service needs. In addition to providing financial support to pay for training costs (e.g., tuition and books), career coaches said that the most commonly needed supports include interview clothes, counseling to boost confidence, assistance with transportation, and computer access. Sometimes, subgrantees provide a general resource and referral list that lays out information about all the services available in the community, rather than discussing supportive service needs with each job candidate in an individual coaching session.

Career Coaching Challenges and Best Practices

As described below, the subgrantees have all confronted challenges and identified best practices with the career coaching component of the BTW50+: WESI model.

Challenges

Subgrantees do not always have the staffing resources to provide the intensity of services that the updated BTW50+: WESI model requires. This is due both to the small number of career coaches at some subgrantees and to the fact that some career coaches also have other program responsibilities. Over half of the subgrantees have given program administrators some coaching responsibilities as a temporary or permanent way to manage the caseload when there are not enough career coaches to take on this work.

Some subgrantees have struggled to incorporate formal service planning and LMI into career coaching. The service planning and LMI subcomponents of the model are more challenging for the subgrantees that do not have close connections with their local AJCs or are housed in academic rather than workforce development divisions of their colleges.

Across subgrantees, fidelity to the supportive services model is limited by the fact that career coaches do not usually follow up on referrals to outside organizations to ensure that job candidates' needs have been met. This is in part because job candidates have had fewer supportive service needs than expected, however, and because career coaches do not want to violate job candidate privacy about sensitive issues. One career coach added that most job candidates are "pretty savvy" and already familiar with how to access community resources like utility assistance.

Best Practices

Enrolling all job candidates as students at the community college affords access to additional student resources. As described in the previous chapter, at ACC, MDC, and EFSC, all job candidates enroll in a non-credit continuing education "shell" class, which enables them to be considered students. The benefit is that they get access to college services and supports such as tutoring, libraries and computer labs, discounted software, and sometimes free public transportation (e.g., bus passes).

In addition to leveraging campus supports, some subgrantees have relationships with outside organizations that provide job candidates with additional coaching and assistance. Most notably, EFSC and JSCC connect job candidates to their AJC partners for coaching and supportive services, and MDC has an on-campus Single Stop location where job candidates can be screened for benefits and connected to other resources. These approaches take advantage of the knowledge and expertise that others have already developed and uses the coaching relationship to make connections to these services.

Computer Skills Training

Computer skills training became part of the BTW50+: WESI model because it was identified as an area of need based on subgrantee experience during the BTW50+: Classic model. Its inclusion also reflected research indicating that computer skills training is a critically needed support among the older jobseeking population (Kogan et al., 2013). Across subgrantees, various staff members work with job candidates to develop their computer skills with an eye toward achieving the level of competency required for a successful job search and gainful employment. Because job candidates come in with widely varying levels of proficiency, subgrantees must work to provide computer training that is well matched to individual computer experience and occupational goals. To accomplish this, subgrantees conduct an initial assessment of job candidates' computer skills, and—based on results—work to provide individualized training options that range in format and intensity.

Adherence to Computer Skills Training Component

Across subgrantees, overall adherence to the computer skills training component is very high, with two programs fully implementing this component as of the second implementation study site visit, and the remaining four fairly close to full implementation.

The two elements of the computer skills training fidelity measure, including their subcomponents, are described below.

1 **The computer skills training is tailored to the needs of each job candidate specifically and older workers generally.** In assessing whether subgrantees have met this model element, site visitors reviewed program design and operations to determine whether:

- The college conducts an assessment of each job candidate's current level of experience, knowledge, and skills using computers in order to place them in an appropriate skills upgrade class. This assessment covers a broad range of computer skills including those needed for job searching, employment, and training.
- The level of computer skills training targeted for a job candidate is matched to the job skills required in the occupations the job candidate is targeting.
- The design and delivery of computer skills training takes into account the particular needs of job candidates for confidence building exercises, extra time for questions, extended time for hands-on practice, one-on-one instruction as needed (through instruction or tutoring), and a choice of the mode of training (e.g., online, blended, classroom-based).
- Several levels of instruction can be arranged to meet the varying needs of job candidates, starting at a basic skills computer literacy workshop and working up to more advanced software classes.

Half of the six subgrantees have fully implemented this element of the computer skills training, while the other half have partially implemented it. Among the latter group, the reasons for not achieving full implementation include: (1) the need to develop *intermediate-level* computer courses that allow job candidates to successfully complete occupational skills training programs; and (2) the need to articulate links between computer skills training and specific job occupations.

2 **The curriculum of the computer skills training is flexible and geared toward both job search and workplace needs.** In assessing whether programs have met this model element, site visitors reviewed program design and operations to determine whether:

- The computer skills training provides appropriate breadth to each job candidate, including instruction in at least three areas (e.g., web browsing, social media, online job search sites and tools, completing online job applications) in order to: support job searching, promote success in training, and ensure facility with software most frequently used in the workplace.
- Trainings on special computer skills needed for specific occupations are available to candidates who need them.
- The computer skills training allows for progress over time and builds on a stackable model. Job candidates can build on current skills and continue learning beyond the 10-week core services program, if interested.
- Whenever possible, the program adapts and draws on existing computer training resources available in the community.
- The program identifies other resources for computer skills trainings as needed—for example, through an Individual Training Account or other community resources.

As of the second implementation study site visit, all but one of the six subgrantees have achieved full implementation of the second element of the computer skills training. The sixth subgrantee has achieved partial implementation of this subcomponent of the element, but still needs to identify additional community resources for computer skills training as appropriate (the last subcomponent listed above).

Evolution of Computer Skills Training

At the time of the first implementation study site visit, the computer skills training was still in relatively early stages of planning or implementation. Findings from that first round of visits informed AARP Foundation's additional guidance to subgrantees on how to design and implement computer skills training. Specifically, SPR found that not all subgrantees were consistently using a formal assessment tool. In some cases, they relied on informal observation of job candidates' computer use (e.g., to complete initial program activities). After some discussion at the 2016 Learning Exchange about subgrantees' experiences with various assessment tools, AARP Foundation formally recommended use of the Northstar Digital Literacy Assessment.[9] All subgrantees except one are currently using Northstar.

Additionally, during the second year of the implementation study, AARP Foundation provided each subgrantee with 12 licenses to the Lynda.com online training platform,[10] the use of which had been piloted at ACC. Lynda.com allows users to browse and complete recorded training modules on a variety of technical skills, which has several benefits. For example, individual job candidates can focus on the computer skills training topics they need to learn and can progress through the course material at their own pace. AARP Foundation decided to make Lynda.com training available to all subgrantees after discussions at the 2016 Learning Exchange on how ACC had been using the site to develop customized playlists of training videos and had found it to be effective in providing a range of training options, provided that job candidates possessed a minimum threshold of capacity (e.g., being able to operate a computer and use a search bar).

Overall, AARP Foundation's additional guidance and support about using Northstar and Lynda.com have been designed to allow job candidates to access computer skills training appropriate to their individual proficiency levels and employment goals. As discussed below, subgrantees are making use of the Northstar Digital Literacy Assessment in different ways and still experimenting with the potential and limitations of Lynda.com.

Variation Across Subgrantees in Computer Skills Training

Subgrantees vary in their specific uses of the initial computer skills assessment, the format and intensity of different-level computer skills training options, and use of online lessons from Lynda.com. These points of variation are discussed in more detail below.

Assessment of Computer Skills

All but one of the six subgrantees uses the Northstar Digital Literacy assessment to gauge job candidates' baseline computer skills. Only one subgrantee has used Northstar since the beginning of program implementation, while the others generally incorporated the assessment between the first and second implementation study site visits as part of their

Northstar Digital Literacy Project

The Project has computer digital literacy standards and modules in five main areas:

- Basic computer use
- Internet
- Microsoft Windows
- Mac OS
- Email

[9] Northstar Digital Literacy assessments can be taken online without cost at https://www.digitalliteracyassessment.org/ and at sponsoring sites. If an organization wants to offer Northstar Digital Literacy Certificates it can complete a process to become an approved site.

[10] Lynda.com is a registered trademark for online training services offered by LinkedIn at www.lynda.com.

refinement of the computer skills training component. Northstar has basic computer digital literacy standards and modules in eight main areas (shown in the text box on the right).

The Northstar Digital Literacy Assessment covers topics such as saving files and identifying memory devices, and the time required for administering it varies depending on the skill level of job candidates being assessed[11]. Subgrantees were satisfied with the Northstar assessment and one program manager specifically praised it not only for its assessment function, but also for its tailored computer skills training resources for job candidates. The only subgrantee not using Northstar has been satisfied with a customized assessment tool developed by program staff, which asks job candidates to complete a series of exercises including opening and editing Microsoft Word files, copying and pasting, conducting online searches, and sending emails with attachments.

In most cases subgrantees use the computer skills assessment to place job candidates in appropriate training options. For example, one subgrantee requires a score of 85 percent on the Northstar assessment for a job candidate to be assessed as already having basic computer skills; typically, half of job candidates fail and are directed to the basic computer skills workshop. However, two subgrantees instead use the assessment to: (1) allow a job candidate to potentially opt out of any computer skills training as part of the program, or (2) assess a job candidate's computer skills at the start of a one-time computer skills training workshop (rather than as part of a placement strategy for longer-term training). Apart from the last example, subgrantees generally administer the assessment not during the computer skills training but earlier, for example after a 7 Smart Strategies workshop or during the first individual or group coaching session.

Computer Skills Training Levels/Paths

Results from the Northstar Digital Literacy Assessment have guided subgrantees' training options for computer skills training at the beginner, intermediate, or advanced proficiency levels.

Beginner Proficiency

All subgrantees described a subgroup of job candidates who need a very basic computer skills training class—one that covers the most rudimentary of operations, including turning on a computer and using a mouse. In some cases, subgrantees were surprised and challenged by the level of need in this area, as it required program staff to re-think their approach and/or dedicate a considerable amount of individual time to job candidates. For example, one career coach described some job candidates who are exceedingly intimidated by their own lack of computer proficiency, and require the career coach's one-on-one reassurance and mentoring on the very basics (e.g., turning on a computer) before they are comfortable going to an introductory computer course. While subgrantees described job candidates who lack confidence in their computer skills and capacity to learn, they also described job candidates

[11] For example, while some individuals can complete the assessment in 15 minutes, one subgrantee reported that it can take up to two hours to administer.

who are overly confident and ultimately struggle without the basic skills instruction they have turned down.

For the subgroup of job candidates who have the most intense and basic computer skills needs, all but one subgrantee offer training via face-to-face instruction in a classroom setting from a computer skills instructor, perhaps reflecting the need for considerable individual attention and support at this level. The subgrantees that offer classroom-based training provide basic-level computer skills training through workshops or classes, ranging in intensity from a single three-hour workshop to a four-week, 24-hour class. The remaining subgrantee offers online training in basic computer skills in a self-paced format.

Basic skills classes are offered on the college campus, mostly by college faculty including adjunct, continuing education, and workforce education division instructors. Only two subgrantees rely on BTW50+: WESI-specific staff (i.e., career coaches and a co-project coordinator) to deliver basic computer skills instruction. Most of the subgrantees offer basic computer skills instruction specially tailored for and exclusive to BTW50+: WESI job candidates. As one subgrantee staff member observed, the basic skills class was designed specifically for many job candidates' computer literacy needs, which tend to be more basic in nature than those covered by the college's other computer offerings (both credit and non-credit). For example, topics covered in beginner-level trainings include using a mouse, opening and saving computer files, setting up an email account, and email and social media etiquette.

Intermediate Proficiency

Job candidates who are initially assessed as having an intermediate level of proficiency—or who have progressed to this point after beginner-level training—and require or desire more instruction can be directed to classes available through the college (e.g., Introduction to Computing) and/or the college's continuing education department, which is open to a broader student population. Half of the subgrantees direct intermediate-level job candidates in this way. For example, ACC directs its intermediate-level job candidates to a two-week continuing education course at a satellite campus that includes a Microsoft Office certificate. SFC-FL points job candidates to options available through the continuing education department, including short online courses on particular software programs as well as a longer, six-month Microsoft Office course.

Half of the subgrantees have deliberately crafted (or are in the process of crafting) intermediate-level classes. In at least two of these cases, this was in direct response to demand or need from job candidates for more training. For example, JSCC worked with the college's workforce education division to develop a four-week intermediate computer course after noticing that job candidates who signed up for the Microsoft Office specialist occupational skills training were struggling with the curriculum. MDC recently established a six-week intermediate class on Microsoft Office, to which job candidates from all previous waves were also invited. Finally, EFSC is developing an intermediate option by curating a group of online exercises and classwork on Alison.com, which, unlike Lynda.com, is free to users.

Advanced Proficiency

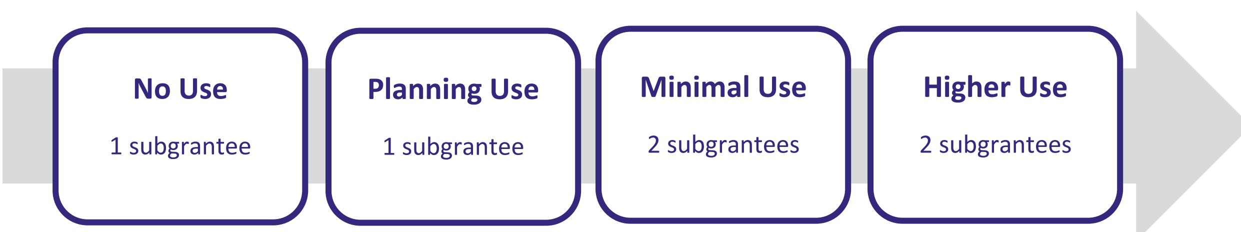
For job candidates at the higher levels of computer skills proficiency, subgrantees rely primarily on a combination of regular college courses as well as Lynda.com. College courses include ones specifically focused on computer skills (e.g., Microsoft Office), as well as courses that include substantial computer skills training as part of a larger occupational skills training program, such as a medical billing and coding program. In one case, computer classes are specially arranged for WESI job candidates only—a beginner- and intermediate-level QuickBooks course, each lasting multiple weeks and combining instruction and lab time.

Only two subgrantees explicitly use Lynda.com for their more advanced job candidates. Staff members at both subgrantees expressed that Lynda.com is an appropriate resource for those who can self-train for specific skills needed for their planned job search. For example, one career coach noted that she has referred job candidates to Lynda.com to access Python or WordPress training.

Lynda.Com Usage

As previously discussed, one of the major developments for the computer skills training since the first implementation study site visit was AARP Foundation's provision of Lynda.com licenses to subgrantees. Exhibit IV-2 shows the continuum of Lynda.com usage among subgrantees as of the second implementation study site visit.

Exhibit IV-2: Continuum of Lynda.com Usage



One subgrantee is not using Lynda.com at all. Another group of three subgrantees is either planning Lynda.com use or using it minimally (e.g., sharing information on Lynda.com during group coaching workshops to see who is interested in a license, or making Lynda.com available for job candidates' exploration during extra computer lab hours). However, in both cases, job candidate use of Lynda.com has been minimal thus far and staff are still determining how to make the best use of Lynda.com resources. For example, in the case of one subgrantee, seven licenses have been distributed to job candidates, but only one has made significant use of the platform's classes.

Some commonly raised issues among the subgrantees who are planning their use of Lynda.com or using it minimally include: (1) a limited number of licenses are provided, and they therefore need to "be careful" about criteria for who gets one (e.g., more advanced job candidates, those who have demonstrated prior use of other computer resources); (2) coaches and instructors are able to make use of other free resources such as Alison.com for similar purposes; (3) many job candidates do not have computers and/or sufficiently recent versions of software to effectively use Lynda.com from home; and (4) some job candidates will not be comfortable with Lynda.com as a standalone resource, but rather as supplementary to, for example, a more guided, in-person class.

Finally, at the time of the second implementation study site visit, SPR found that the two subgrantees that were using Lynda.com the most did so primarily for more advanced job candidates who needed additional training for specific job search plans. However, one was also relying somewhat on Lynda.com for training job candidates at a *lower* proficiency level (i.e., those who completed a basic computer class but were not quite ready for general college computer courses).

Computer Skills Training Challenges and Best Practices

Subgrantees have faced a few key challenges with computer skills training—primarily concerning the level and diversity of need among job candidates—and have also shared some strategies and lessons about this component of the BTW50+: WESI model.

Challenges

Job candidates have widely ranging computer skills, which requires individualization and intensive one-on-one assistance. Designing and providing a computer skills training component is challenging when job candidates have widely ranging starting points with regard to their computer skills. A staff member at one subgrantee noted that she might work with a woman who has a bachelor’s degree in computer science as well as with a woman who can’t turn on a computer. As a result, subgrantees must individualize much of the computer skills training based on personal needs and experiences, which can require considerable one-on-one time. A respondent from another subgrantee noted that they had planned for additional career coaches who will help address this need.

Subgrantees and job candidates sometimes overestimated baseline computer proficiency. At least a couple of subgrantees were surprised by the level of need among job candidates, requiring instruction of the most basic nature (e.g., using a mouse). As a result, staff members sometimes have had to spend a much greater amount of time than expected on individual assistance. In addition, subgrantees sometimes had to rethink their approach based on the extent of job candidates’ basic training needs. For example, one subgrantee initially referred job candidates to college computer courses but quickly realized coaches had overestimated starting proficiency levels. This subgrantee implemented the Northstar assessment to get a more accurate indication of computer skills at the outset of the program. Another subgrantee reworked its approach by crafting a computer class in collaboration with the college’s workforce education division once it became clear that job candidates who did not think they needed basic training were struggling with the Microsoft Office specialist certification preparation program.

Subgrantees are still exploring the potential and limitations of Lynda.com. Even among subgrantees that are using Lynda.com more frequently, questions remain about how to make the best and most efficient use of its promising resources with only a limited number of licenses available. Some subgrantees are still grappling with the question of which job candidates

Lynda.com is most appropriate for—for example, those with high-level computer proficiency; those with low-level proficiency if the platform is paired with other resources; those comfortable with self-directed learning and reliable Internet connections at home, etc. Finally, while Lynda.com holds valuable content, it can be time consuming to navigate and curate specific playlists or modules.

Best Practices

A laptop loaner program has helped address the lack of computer resources at home. SFC-FL offers a laptop loaner program so job candidates can use a computer at home. All loaner laptops come equipped with wireless capabilities and updated Microsoft software.

Pairing Lynda.com with Alison.com can help ensure the former is used for its distinct, value-added components. Because Lynda.com licenses are limited, EFSC relies on the free Alison.com platform to provide some of the content and support that is similar to that offered on Lynda.com—including for the design of an intermediate-level computer class.

Using an assessment *after* a basic skills computer class can be valuable as well. While all subgrantees now use an assessment tool to gauge job candidates' baseline proficiency, JSCC has implemented the use of an assessment tool to help determine job candidates' needs for intermediate computer courses. The tool in this case is a one-page Microsoft Word document with deliberate errors that job candidates must correct.

Applying newly developed computer skills practice to other workshops relevant to the BTW50+: WESI program can be an effective learning mode. For example, at MDC, job candidates attend a resume and online application class directly following the computer skills training so job candidates can practice new skills. At SFCC-NM, job candidates use Microsoft Excel to create a personal budget based on Finances 50+ instruction. SFC-FL has also established a computer booster session so job candidates can practice newly acquired computer skills to work on their resumes and practice emailing.

Financial Capability Building

One of the BTW50+: WESI program's core goals is to connect women age 50 and over with the support needed to achieve full-time employment. This support includes financial capability building. Toward this end, AARP Foundation provides subgrantees with a fully-developed curriculum, including a workbook and recorded modules, for Finances 50+, "a financial capability program designed to motivate and empower participants…to take charge of their financial future and make the most of the financial resources that they have."[12] The course was developed by AARP Foundation in collaboration with Charles Schwab Foundation. It includes budgeting and goal setting, taking charge of credit and debt, and developing a savings plan and protecting assets.

Adherence to Financial Capability Building

As of the second implementation study site visits, only one of the six subgrantees were rated as having fully implemented this component of the model. The two elements of the financial capability building fidelity measure, including their subcomponents, are described below.

"These are people who have had a lifetime of experience but who may be dealing with economic insecurity for the first time in a long time and are having difficulty finding the help they need or determining what their best next steps are."

—AARP Foundation, Back to Work 50+: WESI Playbook

1 **The financial capability building component includes best practices from Finances 50+, such as being interactive and geared towards the needs of job candidates who are 50 or older.** In assessing whether subgrantees have met this model element, site visitors reviewed project design and operations to determine whether:

- The curriculum maps onto Finances 50+, which may be adapted to the local context as needed. It includes the recommended depth of instruction on:
  - setting goals and making a plan to achieve them,
  - creating a budget and prioritizing needs and wants,
  - understanding and managing debt and credit as well as consumer rights,
  - maximizing credit scores,
  - saving money by increasing income or reducing spending,

12 From AARP Foundation's *Back to Work 50+: WESI Playbook*, revised April 2016.

- recognizing the signs of a scam,
  - knowing where to turn with concerns about financial fraud or a scam, and
  - having the motivation and opportunity to put knowledge gained into action immediately to increase financial stability.

- Real life financial examples relevant to those age 50+ (e.g., retirement goal setting, social security, financial planning for health needs) are included.

- The program includes interactive activities.

All subgrantees have achieved full fidelity to this element of the financial capability building component, due to consistent use of the Finances 50+ curriculum and materials provided by AARP Foundation.

2

The financial capability building component is contextualized within the local community and takes advantage of its resources. In assessing whether subgrantees have met this model element, the researchers reviewed project design and operations to determine whether:

- The program refers job candidates to resources in the community that assist with building savings and reducing debt.

- The program provides information about income supports and financial aid that may be available to job candidate.

As of the second implementation study site visits, one of the six subgrantees has achieved full fidelity to this second element of the financial capability building component. Of the remaining five, two have not yet implemented this element, while the other three have achieved partial implementation. The primary reasons for this variation is that subgrantees have not yet identified or harnessed local community resources (including those specifically to assist with building savings and reducing debt).

Variation Across Subgrantees in Financial Capability Building

Given their rather straightforward delivery of the Finances 50+ curriculum provided by AARP Foundation, little variation exists among subgrantees in the delivery of this component. However, some have made minor modifications in terms of scheduling and format. These modifications are discussed below, as are some basic variations in subgrantee staffing of Finances 50+.

Scheduling and Format

The Finances 50+ curriculum is designed for delivery through three 90-minute sessions on: budgeting and goal setting; taking charge of credit and debt; and developing a savings plan and protecting assets. In addition, “exercises and resources are designed to provide motivation, education, and support for positive action to help participants reach their self-defined goals—

whatever they may be—and build financial habits that will help them thrive."[13]

None of the subgrantees have delivered the Finances 50+ curriculum in the recommended three sessions but instead chose to compress the timeframe to one or two sessions of varying length. For example, half of the subgrantees have delivered the curriculum in a single session ranging from three to four-and-a-half hours. The remaining three subgrantees have delivered it in two sessions, each ranging from 90 minutes to three hours.

In terms of format, the subgrantees essentially rely on the Finances 50+ curriculum provided by AARP Foundation by (1) using the recorded webinars with breaks for facilitated conversation; (2) moving through the workshop materials at a steady pace while engaging the job candidates in conversation about the content; and (3) using the script that accompanies the PowerPoint presentation as well as the prompts for group activities. None of the subgrantees reported making major changes to the curriculum or materials, though one career coach noted she does not necessarily feel compelled to go through every single exercise. Subgrantees have made more minor additions and modifications to the Finances 50+ curriculum:

- one instructor models an interview outfit purchased entirely from Goodwill to demonstrate how to shop on a budget;
- one instructor addresses issues of widowhood and divorce, which come up often for job candidates; and
- one program administrator tailors the material to be more relevant to a non-metropolitan area—for example, by adjusting income examples to more realistic levels for the local area.

Staffing

In most cases, career coaches lead and facilitate the Finances 50+ curriculum but may receive assistance from either a fellow career coach, a program manager, or a project director. At one of the other two subgrantees, an adjunct faculty member at the college is the Finances 50+ instructor, and at the other it is a partner AJC staff member. One subgrantee initially relied on a local financial professional to deliver the Finances 50+ curriculum, but switched to a partner AJC staff member because the latter is more dynamic in her facilitation style.

Finances 50+ Challenges and Best Practices

Subgrantees raised no significant challenges with Finances 50+. More minor concerns that did emerge were mainly about whether the material was appropriate and relevant for job candidates still in the core services period. While the concept is perceived as valuable—one career coach noted that for many job candidates Finances 50+ offers a first opportunity to feel safe and comfortable talking openly about money—subgrantees did share concerns about the

[13] From AARP Foundation's *Back to Work 50+: WESI Playbook*, revised April 2016

relevance, timing, and appeal of the material. For example, one career coach expressed that some of the Finances 50+ material may not be new or relevant to job candidates because “they are already 50 years old and have been managing money for a long time.”

The timing of Finances 50+ instruction was also a concern for at least one subgrantee, in that it may “interrupt” the flow of core services and the focus on finding a job. These staff members did not feel that Finances 50+ content is highly relevant, or even necessarily encouraging, before job candidates have secured employment and have any income to manage. Instead staff at this subgrantee suggested gearing Finances 50+ instruction toward pre-employment topics such as salary negotiation.

Best practices for Finances 50+ were also rarely described, perhaps because of the fairly uniform use of structured materials from AARP Foundation. In fact, only SFCC-NM shared successful strategies in this area, namely: (1) requiring Finances 50+ early (before core services) as a way to maintain job candidates’ engagement after the 7 Smart Strategies workshop; (2) emphasizing the importance of Finances 50+ early because “many times [job candidates] are looking for a job *because* their finances are not in good shape”; and (3) pairing the Finances 50+ workshop with two follow-up Microsoft Excel workshops that allow job candidates to directly apply what they have learned on budgeting while also practicing their computer skills.

Job Search Skills and Employer Engagement

Per the program model, job search training and support is a key element of BTW50+: WESI. Job search training and support must be provided both during the initial delivery of core services, and as a continuing support, as needed, to individual job candidates during the search for employment after the end of core services. Job search training begins with participation in the 7 Smart Strategies workshop, before official enrollment in BTW50+: WESI, and continues throughout core services and beyond. The model also calls for employer engagement, through contact between both program staff and employers and job candidates and employers during the active job search support and monitoring phases.

Adherence to Job Search Skills and Employer Engagement

To achieve fidelity to the program model established by AARP Foundation, subgrantees need to: (1) use staff (coaches and job search instructors) who are knowledgeable about local job market opportunities and familiar with local employer hiring procedures in the targeted occupations, (2) provide job search training and support that is tailored to the needs of job candidates both during and after the completion of core services, and (3) arrange for employer engagement in job search training activities and ensure contacts with employers during placement support activities.

Overall, at the time of the second implementation study site visit, subgrantees had made progress towards fully implementing the job search skills and employer engagement components of the model, though there were notable variations in the extent of implementation fidelity. Three subgrantees were rated as having fully implemented the job search skills enhancement component, while another had achieved close to full implementation. All four of these subgrantees had prior relevant experience, either operating a BTW50+ Classic program or providing services to jobseekers through the public workforce system. The two remaining subgrantees had not yet achieved partial implementation. Details on individual elements of fidelity appear below.

1

Staff members are familiar with local labor market trends and opportunities and are knowledgeable about local hiring practices in the targeted occupations. In assessing whether programs have met this element of the program model, site visitors reviewed program designs and operations to determine whether:

- Program staff members use up-to-date labor market information and provide job candidates with details about training needed, working conditions, wages at entry level, and opportunities for advancement for the careers in which they are interested.
- Program staff members have established relationships with local employers in the fields of interest to job candidates and can describe employer hiring practices.
- The program has established connections to the local workforce development system and connects job candidates to the resources available from local AJCs.

Overall fidelity to this element is high. Four of the six subgrantees were rated as meeting the stated criteria fully. Recent staffing changes and resulting program redesigns caused two subgrantees to be rated lower on this element. Three subgrantees are still working to develop a strong relationship with their local workforce development systems.

2

The program provides job search skills training and job placement support that is tailored to the needs of job candidates. In assessing whether subgrantees have met this program element, site visitors reviewed program designs and operations to determine whether:

- The program offers workshops dedicated to project participants covering the job search skills topics that incorporate the "7 Smart Strategies" provided by the AARP Foundation.
- Job candidates receive instruction in current job search skills, including online applications and job search websites, social media, and current resume, cover letter, and interviewing methods (either in the above workshops dedicated to BTW50+: WESI job candidates or through other programming offered by the college).
- Job candidates have access to peer support during job search, for example through participation in a job club or group coaching sessions.
- Job candidates in both the core services and training subgroups have access to job search skills training and placement support, though they may receive it at different times or through different channels.

Overall fidelity to this program element was rated as high. Three of the six subgrantees were rated as meeting the criteria for this element fully. Criteria that have been challenging for the remaining subgrantees include the ability to provide job placement support to job candidates after the completion of occupational skills training, and the provision of peer support during job search.

3

Programs have arranged for employer engagement in the design and delivery of core services and have created opportunities for employer contact with job candidates during the individual job search phase. To assess the level of fidelity to this program element, site visitors reviewed program designs and operations to determine whether:

- The program has developed relationships with local employers in the targeted occupations.
- Employers have helped the program planners identify unmet labor market and training needs.
- The program creates opportunities to involve employers in work-based training (e.g., internships and on-the-job training).
- Employers participate in job fairs at which BTW50+: WESI job candidates are featured.

Overall fidelity to this element was rated as moderate. Only two of the six subgrantees were rated as meeting this program element fully. The remaining four subgrantees have all made some progress in engaging employers, but have not yet met all the criteria stated above. Challenging aspects include involving employers in designing and delivering job search training during core services and creating opportunities for job candidates to have contact with potential employers, for example through work-based training or other activities.

Variations Across Subgrantees in Job Search Skills and Employer Engagement Model

Subgrantees exhibited several key variations in the delivery of the job search skills and employer engagement components:

Staffing and modality of job search skills instruction. All subgrantees offer job search skills enhancement through a combination of individual coaching sessions and group workshops. Group sessions provide an opportunity to discuss and practice effective job search approaches, while individual coaching sessions focus on individual job search strategies and practices. Two subgrantees have BTW50+: WESI coaches lead the job search skills training workshops. Others use existing college staff, instructors, or guest speakers to assist in leading or presenting at the job search skills training workshops. One subgrantee supplements face-to-face instruction with the college's pre-existing online "Get that Job" training modules. Available to all students, and not specifically designed for older jobseekers, “Get That Job” is a series of videos on topics such as job search strategies, resume development, interviewing, and developing a LinkedIn profile.

Intensity and duration of job search skills training. Subgrantees vary in the intensity and duration of the job search skills training workshops provided. One subgrantee schedules all of its job search training workshops over a four-day period during the first week of program activities. Others schedule their workshops to occur once or twice a week over a period of up to four weeks after enrollment. Three subgrantees have compressed the schedule for delivery of job search skills training workshops after program launch from six or eight weeks, as designed initially, to three or four weeks, to reduce dropouts and increase the proportion of job candidates who complete all the scheduled workshops.

Challenges and Best Practices

Subgrantees have faced a few key challenges implementing this component, primarily concerning engagement of workforce system partners and employers, and also shared strategies and lessons with regard to this component of the BTW50+: WESI model.

Challenges

Some subgrantees have found it difficult to build strong service delivery and referral relationships with the local workforce development system. For one subgrantee, staff turnover at the leadership levels at both the community college and the local AJC have made it difficult to identify and sustain a primary contact between the two entities. Subgrantee staff also noted that this AJC serves a higher-need population than BTW50+: WESI, and job candidates might not feel comfortable there. Another subgrantee has not built a strong relationship with its local AJC in part because that AJC operates a BTW50+ Classic program and the two entities are essentially in competition for applicants.

All subgrantees have found it challenging to engage local employers in face-to-face interactions with job candidates to the extent envisioned in the BTW50+: WESI program model. The model strongly suggests that subgrantees involve employers in the delivery of core services (e.g., in presentations on effective interviewing skills), as well as in identifying and preparing training curricula for targeted occupations. The Playbook also encourages programs to bring job candidates face-to-face with potential employers by arranging internships during training or holding job fairs toward the end of training. For programs that prepare job candidates for a wide variety of different occupations, however, it is difficult to engage individual employers in activities that are relevant for all job candidates. Employer representatives have also found it difficult to commit the time needed to meet with job candidates face-to-face.

Best Practices

Strong *existing* relationships with the local economic development and workforce development systems appear to strengthen access to current labor market information and subgrantees’ ability to identify in-demand occupations within the region that match job

candidates' interests and skills. Half of subgrantees have been able to leverage such relationships to benefit job candidates:

- EFSC, as noted earlier, shares project management and service delivery responsibilities for its BTW50+: WESI program with the local AJC. Because of that partnership, the college is able to access a widespread employer network as well as secure program staff who are experienced in career counseling, labor market information, and effective job search/job placement practices.

- JSCC's BTW50+: WESI program operates out of an AJC housed on the college campus and is co-funded by the college and local workforce development board. In fact, the BTW50+: WESI project director is also the director of the local AJC, which is open to both students and customers from the general public. Her program staff work part time for the AJC, providing career counseling and job search support to all AJC customers. Because of their dual roles, program staff can connect to a widespread employer network, access local job postings from the public system to make job referrals to BTW50+: WESI job candidates, and are experienced in referring workforce customers to training and support for their job search efforts.

- At SFC-FL, BTW50+: WESI staff members are active in local human resource associations and regional leadership programs to help connections to the employer community. They also advertise the program at local job fairs. The program has co-sponsored job fairs with the Gainesville Chamber of Commerce and the local public workforce development system.

Some subgrantees have begun to explore creative options for linking job candidates with work-based training. For example, SFC-FL used funds from a separate grant arranged by AARP Foundation to design and pilot a 6-week, 120-hour paid internship for 10 job candidates during the second year of the program. All internship participants were very satisfied with their experiences, and two of these internships led directly to ongoing employment for the job candidates with their internship sponsors. Unfortunately, funding was not available to continue the internships after the end of the grant. At EFSC, strong AJC participation in the program was expected to make it easier to create opportunities for work-based training (e.g., on-the-job training contracts) for job candidates with local employers, although this aspect of the program is still in development.

Occupational Skills Training

Another key element of the BTW50+: WESI model specifies that programs make occupational skills training available to job candidates and support them in arranging for occupational skills training. However, the model assumes that only a subset of all job candidates will enroll in training if it is needed to upgrade existing skills or develop new skills to prepare for their selected employment goals. Subgrantees are expected to develop a range of training options that will be of interest to job candidates and will prepare them for employment in local, in-demand jobs that can offer economic stability.

Adherence to Occupational Skills Training Model

To achieve fidelity to the program model, subgrantees must (1) develop training options that are well-matched to the needs of the job candidate population and broad enough to give them adequate choice, and (2) provide support to job candidates during and after training to help them succeed in training and reach their employment goals.

Across all subgrantees, average fidelity across the different aspects of occupational skills training is high, though there is variation in the extent to which individual subgrantees have fully implemented the required elements for occupational skills training. Three of the six subgrantees were rated as having fully implemented the key elements of occupational skills training, while the other three have not yet achieved full implementation.

Slow program start-up and/or staff turnover has hampered the development of the occupational skills training design for two of the subgrantees. (Each of these two had enrolled fewer than three job candidates in training at the time of the second implementation study site visit.) The remaining subgrantee has not yet fully achieved the capacity to provide support to job candidates during and after training. Details on the fidelity of subgrantee implementation practices to each required element of the occupational skills training model are provided below.

1

The program offers a range of training options tailored to the needs of job candidates. In assessing whether subgrantees have implemented this model element, site visitors reviewed program design and operations to determine whether:

- Training options target local, in-demand occupations.
- Career coaches are familiar with the available training offerings across a wide variety of occupational areas and parts of the college.
- Job candidates receive individual coaching from the career coach or other college staff to help them select training relevant to their employment goals.
- The recommended training options are of interest to older workers and targeted towards their skill levels (building on skills they might already have).
- Short-term training is available to job candidates who want to get back to work quickly.

Across the six subgrantees, average fidelity to this model element is high. Four of the six subgrantees were rated as having fully implemented this element of the program model. The two subgrantees that have not yet demonstrated fidelity to this element have been slower in developing and implementing their occupational skills training designs.

2

Providing support to job candidates during and after training. In assessing whether subgrantees have realized this model element, site visitors reviewed program designs and operations to determine whether:

- BTW50+: WESI career coaches or other support persons checked in regularly with training job candidates to ensure that their needs are being met during training.
- Job candidates in training receive support from their peers (e.g., through peer study groups or other activities involving contacts with other BTW50+: WESI program participants).
- Job candidates identify with and feel supported by the BTW50+: WESI program after completing core services and entering training.

On average, at the time of the second implementation study site visit, subgrantees were partially implementing this training support component. Three subgrantees were rated as having fully implemented this element. Two subgrantees were rated as partially implementing this element; the remaining subgrantee was not yet far enough along in developing and implementing its training design to have implemented this element. As noted below, several subgrantees faced challenges in maintaining a connection between job candidates and the BTW50+ WESI program after the completion of core services.

Variations Across Subgrantees in Occupational Skills Training Model

The BTW50+: WESI model allows subgrantees substantial flexibility in the proportion of job candidates who participate in occupational skills training, the types of training options offered, and how the training draws on the various credit and non-credit programs offered by the college. Key commonalities and variations in how subgrantees have designed and implemented occupational skills training are described below.

Orientation to training options. Subgrantees vary in whether they provide an orientation to available training as one of the earliest activities in core services, or whether they wait until closer to the end of core services to discuss these options. As discussed in the next chapter, feedback from focus groups indicates that job candidates prefer to receive guidance on occupational skills training early on so they can plan accordingly.

Developing individual training plans. Once training opportunities are introduced, subgrantees tend to follow a similar pattern in helping to match job candidates who are interested in training to the variety of training options. The typical pattern begins with job candidate self-exploration and self-assessment exercises (e.g., using interest inventories and other individual skills assessments or group exercises), followed by the delivery of information about local labor market opportunities and constraints including information about the demand and wages for different occupations. Most often, a job candidate develops a specific employment and training plan during an individual coaching session with her career coach. During the session, the career coach guides the job candidate in developing an individual employment goal, with close attention paid to individual interests, labor market demand, and whether the job candidate needs part-time temporary employment to support her and her household during training. Usually, the job candidate also meets with an academic advisor connected to specific occupational skills training programs prior to enrolling, particularly if she is interested in enrolling in a for-credit program.

The proportion of job candidates who choose occupational skills training. Subgrantees vary in the proportion of enrolled job candidates who decide to enter occupational skills training. Two subgrantees, as previously mentioned, were so delayed in implementing training services that fewer than three job candidates had enrolled in occupational skills training by the time of the second implementation study site visit. For three of the remaining four subgrantees that have enrolled job candidates in training, the proportion of job candidates enrolled in occupational skills training is somewhere between 20 and 35 percent of all participating job candidates. At the fourth subgrantee, a very high proportion of job candidates indicate interest in occupational skills training and a total of 60 percent of all job candidates to date have enrolled. Individual decisions to enroll in occupational skills training appear to be influenced by a number of factors including conditions in the local job market, the job candidate's level of self-confidence, the availability of short-term training opportunities of interest to the job candidate, the availability of training scholarships from the program, and the existence of family responsibilities, financial pressures, or transportation barriers that make it difficult for the job candidate to participate in training.

Extent of variations in the training options. Subgrantees vary in the number and types of training options they offer to BTW50+: WESI job candidates. Of the four programs that have made progress in enrolling job candidates into occupational skills training, three offer substantial flexibility with respect to the type of training that best meets job candidates' individual interests and existing skills—as long as there is strong labor market evidence that the training is for a local demand occupation. Two subgrantees encourage job candidates to take only one or two courses if that is all they need to upgrade their skills and be competitive in the job market; two others encourage job candidates to enroll in and complete established certificate programs.

One subgrantee is quite restrictive, limiting training options for BTW50+: WESI participants to five programs offered by the college's non-credit workforce education division. These programs are a subset of short-term non-credit occupational programs that the division had recently developed after consulting with local employers. Otherwise, most subgrantees have enrolled job candidates in a wide variety of training programs. The most popular training programs include office occupations, including training in office software programs; health-related occupations; and IT-related training.

Variations exist both within and between subgrantees in the mode of training (online, hybrid, and classroom-based), the status of the training (for-credit or non-credit), the academic degrees or certifications offered (usually for-credit certificates in a career-oriented training program) and the duration of training (four weeks to 1.5 years). Although four of the subgrantees offer training that follows regular college quarter or semester schedules, two encourage job candidates to enroll in available training that is short-term, compressed, and offered more frequently than once every quarter, enabling job candidates to enter training without a semester delay and to complete short-term training in four to 10 weeks.

Training is rarely developed specifically for WESI participants. Although several subgrantees have found that job candidates appreciate and benefit from being enrolled in training alongside other BTW50+: WESI candidates, most have found that job candidates benefit from taking classes alongside younger students. One subgrantee, reported that when too many job candidates were enrolled in the same class it overburdened the instructor, disrupted class instruction, and shifted the classroom culture in negative ways given job candidates' high anxiety and concerns about passing the course.

Support offered during training. Subgrantees use different approaches to support job candidates after they enroll in training. In all programs, the BTW50+: WESI coaches maintain regular contact with job candidates during the training period, but the frequency of these contacts was reduced (e.g., to once a month) because subgrantees found that individuals enrolled in training were very busy attending to their studies. Training program coordinators and academic advisors usually play a role in monitoring job candidate progress through training, alerting coaches if a job candidate is experiencing difficulties. Coaches usually do not have any contact with course instructors on behalf of individual job candidates.

Challenges and Best Practices

Subgrantees noted several challenges around occupational skills training, primarily related to supporting job candidates' choice of and success in training. They have also developed a range of best practices to deal with these challenges.

Challenges

Most subgrantees find it challenging to develop a wide enough range of occupational skills training options to meet job candidates' varying needs. All colleges identified several high-demand, high-growth sectors of the local economy in which they planned to focus training opportunities. But once they started working with job candidates, subgrantees often found that they have a wide range of work experience and transferrable skills. Some are interested in upgrading their skills and remaining in an occupation related to their previous employment while others are looking to transition to brand-new occupations.

Subgrantees find that lack of financial support is a major barrier to enrolling in training for BTW50+: WESI job candidates. Even though subgrantees offer support for tuition and books, most job candidates have difficulty meeting daily living expenses and healthcare needs as a result of long-term unemployment or underemployment. To address this challenge, two subgrantees help job candidates who need financial support to find temporary part-time jobs in occupations like retail or restaurant work to support themselves while they attend training. Two other subgrantees encourage job candidates to explore other funding sources to support themselves during training, such as Pell Grants, Social Security, or financial support from family members.

Some subgrantees have found it challenging to intervene to address issues that arise when BTW50+: WESI students have difficulties in occupational skills training. After completing core services and beginning training, job candidates often reduce the frequency of their contacts with their assigned BTW50+: WESI career coaches. Although program staff members usually check in with training program leads about whether BTW50+: WESI candidates are doing well in their courses, they generally do not communicate directly with course instructors.

Best Practices

Close working relationships with different training divisions in the college strengthen subgrantees' ability to offer job candidates a variety of training opportunities. For example, SFC-FL has strong relationships with both non-credit and for-credit training divisions within the college. The program uses these relationships to offer students a wide range of short-term online courses, business skills upgrade courses, short-term credit- or non-credit certificate programs that can be taken separately or "stacked," and longer-term associate degree career and technical education programs offered at the college. JSCC uses a different approach, drawing on short-term (four- to 12-week) non-credit vocational programs that its workforce education division previously developed with strong employer input. These training programs were selected for their ability to prepare job candidates for specialized "niche" occupations with unmet labor demand, such as billing and coding specialist for healthcare or specific software or computer skills credentials for office occupations.

Strong partnerships with other college departments can also provide needed resources to develop systemic solutions to support BTW50+: WESI students. As discussed in the computer skills training section of this chapter, JSCC worked with the college's non-credit workforce education program lead to establish a new intermediate computer skills course—available to all students at the college—that can be taken as a foundation course to prepare students for success in the Microsoft Office occupational skills training program. At SFCC-NM, the project manager has helped job candidates struggling to keep up in a course by arranging tutoring support (available free of charge from the college for all students).

Differentiation of BTW50+: WESI from Services Available in the Community

Based on the implementation of the program as presented in this chapter, on data gathered from subgrantees about other resources at the community colleges, and on visits to local AJCs during the site visits, BTW50+: WESI services differ from other services available in the community primarily because they are designed specifically for women 50 and older:

- **Occupational skills training for job candidates in the BTW50+: WESI program is distinctive primarily because job candidates receive financial support and are guided toward training options well-suited to the transferrable skills and income needs of older female jobseekers.** Training program options for BTW50+: WESI job candidates are generally not very different from options available to other 50+ women in the community who pursue short-term training directly through the college or via the public workforce system. This is primarily because most training programs are not exclusive to BTW50+: WESI job candidates. The main difference is the training scholarships available through the grant, though as noted above, job candidates still struggle to support themselves during training, and other students may be able to fund their training through Individual Training Accounts, other scholarships, or financial aid.

- **Career coaching offered through BTW50+: WESI is unique in its duration, scope, and intensity, as well as because coaches are trained to be sensitive to the needs of older female jobseekers.** While other students and community members can access individual case management through the public workforce system or college career office, such coaching is not customized to the needs and concerns of older female jobseekers. As noted earlier in the chapter, career coaching is frequently delivered by coaches who are themselves women close to or over 50, and the diversity of their roles—in particular, their efforts around confidence boosting and creation of cohort identity—is both unique to the program and specifically valued by job candidates. This point is explored more fully in the analysis of survey and focus group responses in Chapter V.

- **The program's job search skills training is distinct from what is available on campus and through the public workforce system primarily because it is tailored to older jobseekers who have generally had long-term workforce experience, but who may not be familiar with current job search tools and techniques.** Visits to local AJCs revealed that available workshops do cover topics similar to BTW50+: WESI such as developing resumes, preparing for interviews, and creating online personal marketing tools like a LinkedIn profile. Moreover, some participants in these workshops may be women over 50. Nevertheless, the content is not designed for or consistently delivered by women over 50. While some of the AJCs visited do connect older jobseekers to the Senior Community Service Employment Program, this program is targeted to an older (55 and above) population with lower income and basic skills levels than most WESI job candidates.

Additionally, some elements of the model are simply unique to BTW50+: WESI:

- **Financial capability building is a unique aspect of the program not generally available to others.** Across subgrantees, Finances 50+ offers an important point of differentiation from other services available in the community, both because it is available only to job candidates in the program and because this type of training is not widely available through either the community colleges or the public workforce development system. One career coach noted that because the college does not offer any other financial education programs, Finances 50+ fills a critical gap: "I'd offer it every day out in the hallway [to traditional-aged students] if I could."

- **Computer skills assessment—and customized training to remediate these skills—is another distinctive feature of the job candidate experience.** Higher-level training and, in some cases, basic computer skills training is available to anyone at the community colleges (and online training platforms are available to the general public). However, standardized assessment of computer proficiency does not typically occur prior to beginning a job search in the public workforce system or a training program at the community colleges. Participation in BTW50+: WESI therefore may equip job candidates with both the knowledge of what specific skills need to be upgraded and a pathway to appropriate training to do so.

Finally, although the intended BTW50+: WESI model emphasizes access to supportive services and a high level of access to local employers, the services received by job candidates may be similar to—or even less intensive than—services available to others for these core service elements.

- **Although job candidates have access to a unique funding stream for tuition expenses, the other supportive services to which they have access may not be particularly different from those available to individuals who visit a local AJC or enroll in a community college.** For example, at two subgrantees, job candidates are referred to campus resource centers that also serve the rest of the campus population. At two others, the main supportive service referral activity is providing job candidates a list of community resources prepared by 211 or other community organizations. Theoretically, these services are available to anyone in the community.
- **The lower than expected level of employer engagement for BTW50+: WESI job candidates means that community college departments and the public workforce system may offer equally strong, or even stronger, links to local employers.** As noted earlier in the chapter, subgrantees are still working to realize the employer engagement element of the program model. This has been difficult in part because subgrantees generally are not preparing job candidates to seek out employment in particular occupations or sectors (though employer engagement still can and should occur regardless of targeted sectors during the active job search support phase). By contrast, the AJCs visited have dedicated business services staff and/or job developers who maintain strong employer connections. Moreover, college training programs that prepare students for careers in a particular sector also emphasize and nurture connections to relevant employers in the region.

Synthesis and Conclusions

This interim implementation report focuses on how well the programs designed and implemented by BTW50+: WESI subgrantees have captured the key elements of the program model and documents their progress toward full implementation. The findings in this chapter show that the subgrantees have made substantial progress toward implementing programs that realize the intended BTW50+: WESI program model.

Chapter findings have several important implications for the remainder of implementation and beyond. First, BTW50+: WESI is a new program model. Some BTW50+: WESI model elements may be appropriate as part of the program approach, but seem to require more technical assistance and support to be fully implemented. For example, the program model emphasizes the need to engage local employers in multiple facets of the program, including targeting well-paying jobs identified by employers as hard to fill with skilled workers; involving employers in creating opportunities for employer-based training; and bringing employers into contact with job seekers during the job search process. Across all subgrantees, this tends to be one of the least-developed elements and lowest points of differentiation from available alternative services, which may impact subgrantees' ability to help job candidates find good jobs that offer economic stability.

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Chapter V: Job Candidate Perspectives

Introduction

To contextualize findings about program implementation presented in earlier chapters, this chapter reviews the perspectives of job candidates in BTW50+: WESI as measured through surveys and focus groups. The chapter starts with a brief overview of the follow-up survey and the survey sample, and then reviews survey results in the following areas: reasons for enrollment; satisfaction with key program components; attitudes and behaviors related to computer use, financial capability and quality of life; and self-reported employment indicators and plans for the future. To complement the survey data, the chapter also summarizes feedback collected through focus groups conducted during implementation study site visits. The chapter concludes with a synthesis and summary of findings on the job candidate experience and their implications for program operations.

Key Findings

- **Self-reported motivations for enrollment indicate that the program is providing accurate messaging in its outreach.** Survey results show that most respondents were motivated to enroll in BTW50+: WESI in order to bolster their job searches, both through learning about new employment opportunities and upgrading their computer skills to be competitive in the job market.

- **While survey results indicate satisfaction with the content of most program components, focus group feedback suggests areas for improvement in service delivery and guidance.** Survey responses show moderately high levels of satisfaction with core components of the program, though feedback from focus groups indicates that more interactive and personalized delivery would be appreciated. Additionally, while a high proportion of job candidates expressed interest on the survey in continuing with occupational skills training, focus group feedback points to wide variation in the strength of connection to and guidance on training across subgrantees.

- **Survey respondents report positive attitudes and behaviors at three months after enrollment, but self-reported employment rates are somewhat low.** At three months after enrollment, job candidates report feeling relatively comfortable using computers, say they engage in positive short-term financial behaviors, and are enjoying a relatively high quality of life. However, just under half (48.5 percent) report being employed either full time (11.9 percent) or part time (36.6 percent).

Survey Background and Sample Characteristics

SPR's subcontractor, the Social and Economic Science Research Center (SESRC) at Washington State University, conducts telephone surveys of all job candidates at three, six, and 12 months after enrollment. Surveys began in November of 2015, at the three-month mark for those who enrolled in August of 2015. All candidates who enroll through the end of program implementation will be contacted for these follow-up surveys, so the survey sample will be considerably larger for subsequent evaluation reports.

Results in this chapter draw exclusively on three-month follow-up surveys administered through November 2016. The sample includes 221 out of 509 job candidates contacted, for a response rate of 44 percent.[14] Job candidates who completed this three-month survey had already completed core services and were generally part of waves that occurred prior to the start of enrollment into the impact study. This interim implementation report does *not* include analyses of the six-and 12-month surveys, and except for preliminary findings by employment status, the analyses of three-month survey do not include results by respondent demographics, program outcomes, or subgrantee, because the sample size is not yet sufficient to conduct such analyses. Where findings are presented by employment status—an exception made because employment is a key outcome of interest and preliminarily survey results indicate that less than half of survey respondents had achieved this outcome—they should be interpreted with caution due to the small sample size. The final implementation study report, however, will have a larger survey sample and therefore will include more detailed subgroup analyses.[15] For additional details about the survey methodology, please see Appendix C.

Job candidates contacted for the survey had enrolled in BTW50+: WESI programs across all six subgrantees but were not evenly distributed among them. As shown below in Exhibit V-1, over half of the job candidates contacted had participated in the program at either ACC (29.9 percent) or EFSC (25.2 percent). About one in five enrolled in the program either at SFC-FL (19.7 percent) or SFCC-NM (18.7 percent). Fewer respondents had participated in the program at colleges with the newest BTW 50+: WESI programs (5.5 percent from JSCC and 1.2 percent from MDC).

[14] Response rates for the six- and 12-month surveys were lower than for the three-month survey—26 percent and 22 percent, respectively. For further details on survey response rates, please see Appendix C.

[15] Future analyses will include linear regression models to examine whether attitudes, behaviors and outcomes vary by respondent characteristics (e.g., age, gender, race) or other factors of interest. They will also include an assessment of how computer attitudes, financial capability, and quality of life change from the three-month survey to the six- and then to the 12-month survey.

Exhibit V-1: Job Candidates' Enrollment by Subgrantee

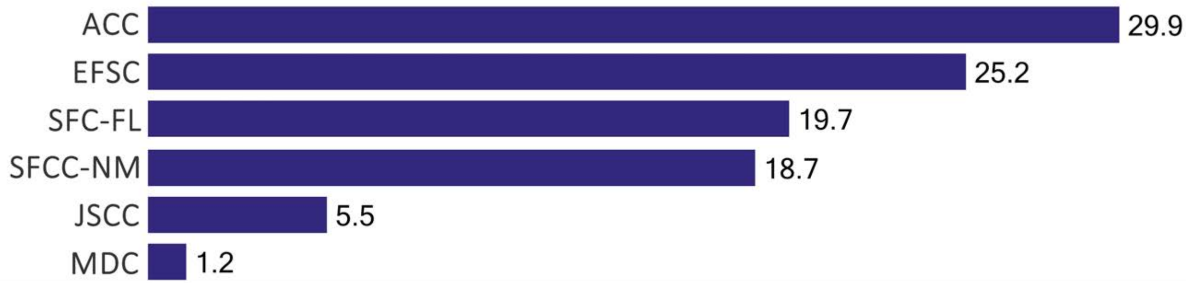

Exhibit V-2 below provides a demographic profile of the universe of eligible BTW 50+: WESI participants who were contacted for the survey.[16] The vast majority (90.2 percent) were female. Nearly six in 10 respondents (56 percent) identified as White/Caucasian, about one-fifth (21 percent) identified as Black/African American, and one in seven (14.7 percent) identified as Hispanic/Latino. The remainder chose another race/ethnicity or did not answer the question.[17]

In terms of age, about one-third (32.5 percent) were 49 to 55 years old, one-quarter (25.4 percent) were between the ages of 56 and 58, and one-fifth (20.4 percent) were between the ages of 59 and 62. Fewer were between the ages of 63 and 65 (10.6 percent) or 66 or older (11.2 percent).

These demographic characteristics indicate that the program is generally serving the targeted population of women between the ages of 50 and 64, with strong representation from those earlier in their working lives who, as anticipated by AARP Foundation in the program's design, may not be eligible for the Senior Community Services Employment Program (SCSEP) or other programming for older adults.

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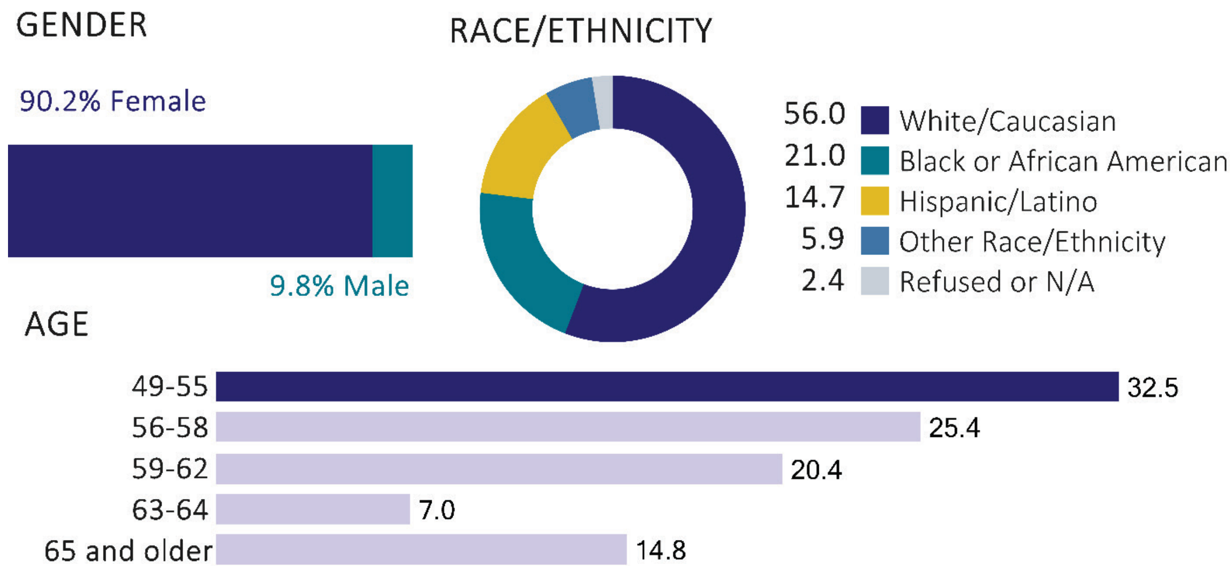
[16] SPR determined that the sample of respondents to the three-month follow-up survey is representative of the overall pool of BTW50+: WESI participants (as recorded in the FIS) after statistically assessing the differences between both groups in terms of several demographic characteristics. Demographic characteristics in this comparison included age, gender, race/ethnicity, prior education, and college attended. (See Appendix C for specific details.) In the body of this chapter, characteristics are presented for the entire universe.

[17] All survey respondents who identified themselves as Hispanic/Latino, regardless of racial background, are included in that group. Asians, Native Americans, and other respondents who identified themselves as "multicultural" are included in the "Other" race/ethnicity group.

Exhibit V-2: Demographic Characteristics of Survey Respondents



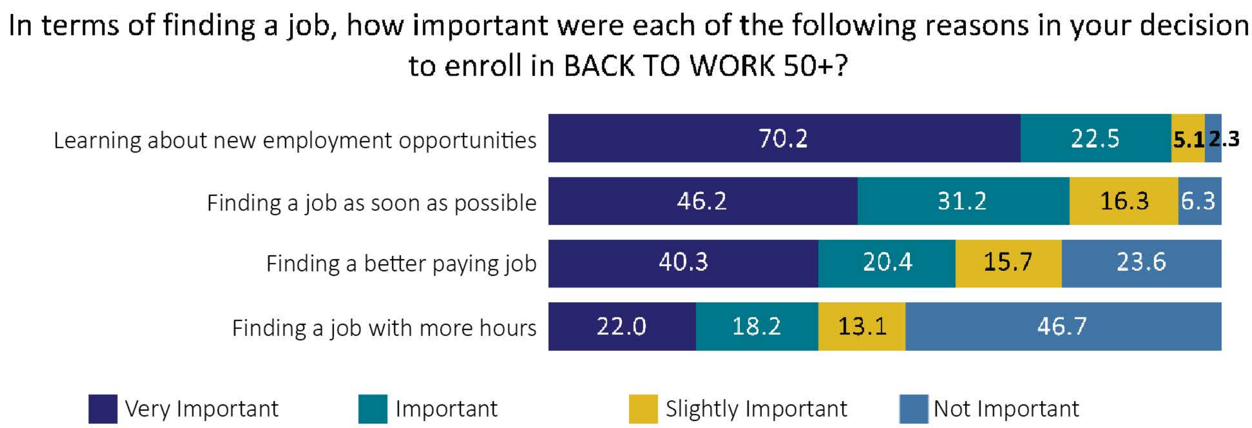
Survey Results

The survey asked respondents about their reasons for enrolling in the program; satisfaction with key program components; attitudes and behaviors around computer use, financial capability, and quality of life; employment status; and plans for the future. The remainder of this section discusses key findings on each of these topics. Frequencies for all questionnaire items appear in detail in Appendix D of this report.

Reasons for Enrollment

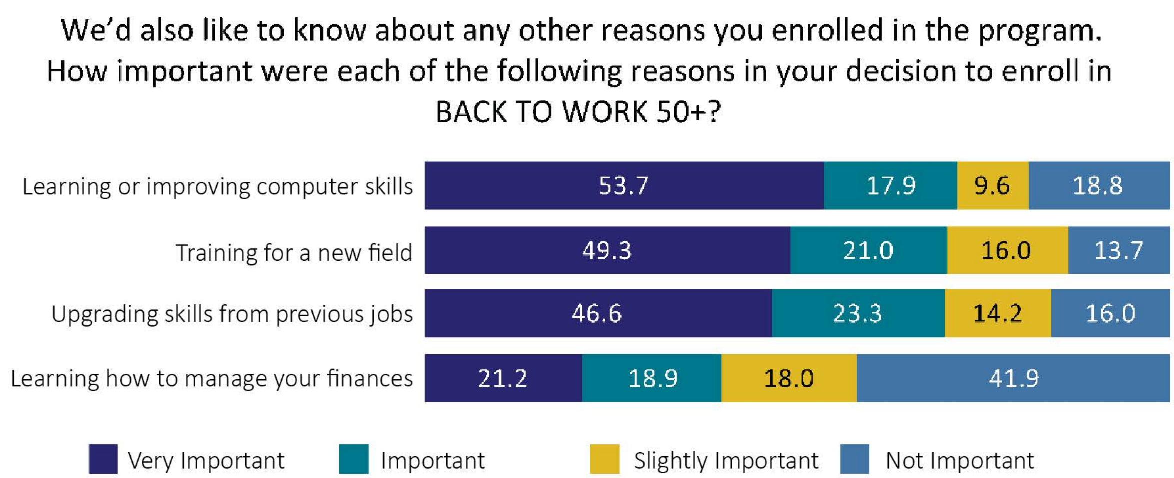
Learning about new opportunities for employment is an important factor in candidates' decisions to enroll in BTW50+: WESI. As Exhibit V-3 shows, seven in 10 respondents (70.2 percent) rated learning about new opportunities for employment as very important in their decision to enroll. In comparison, fewer than half of the candidates said that finding a job as soon as possible or that finding a better paying job was very important (46.2 percent and 40.3 percent, respectively); only one in five (22 percent) considered finding a job with more hours as very important. These findings are logical given that the rubric used for scoring program applications, as described in Chapter III, prioritizes serving women who are unemployed at the time of application, and who are therefore eager to find a new job at the time of enrollment. Finding better work—that is, work with more hours or better pay—appears to be secondary.

Exhibit V-3: Reasons for Enrolling in BTW50+: WESI



Upgrading skills emerged as another important motivation for seeking out services. As Exhibit V-4 shows, over half of respondents (53.7 percent) said learning or improving computer skills was very important in the decision to enroll in the program, and just under half considered training for a new field (49.3 percent) and upgrading skills from previous jobs (46.6 percent) as very important. Learning how to manage finances was not as important in candidates' decisions to enroll in the program: A slight majority (59.9 percent) said it was not important or only slightly important; fewer said it was important (18.9 percent) or very important (21.2 percent).

Exhibit V-4: Other Reasons for Enrolling in BTW50+: WESI

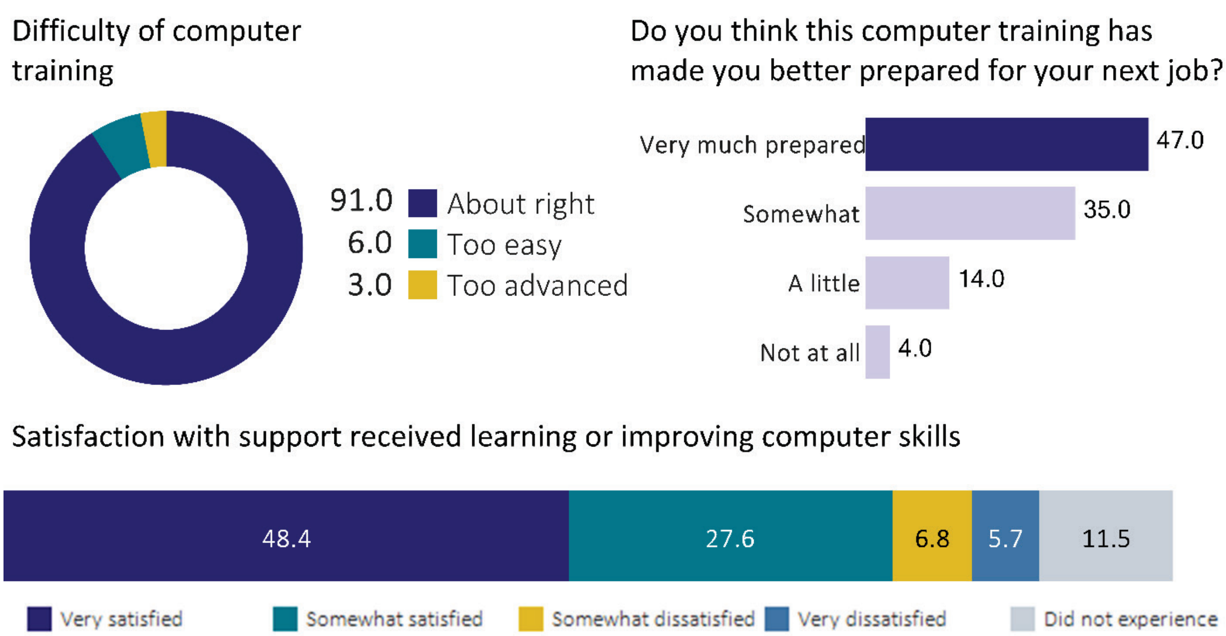


Computer Skills Upgrade

As noted above, learning or improving computer skills was an important reason for enrollment in the program. Among respondents who reported participating in training to learn or improve their computer skills, the vast majority (91 percent) said that the computer training was about right for them, and only small percentages said the training was either too easy (6 percent) or too advanced (3 percent).

Those who received computer skills training were asked how prepared it made them for their next jobs. Nearly half (47 percent) said it had made them very much prepared, and about a third said it made them somewhat prepared (35 percent). Just under one-fifth (18 percent) said it prepared them a little (14 percent) or not at all (4 percent). When asked about their level of satisfaction with the computer skills component of the BTW50+: WESI program, about three-quarters (76 percent) said they were very satisfied or satisfied with the support they received with learning or improving computer skills. More than one in 10 (11.5 percent) reported that they did not experience this component of the program, which is consistent with Chapter IV's findings that (1) this component was not fully developed in earlier waves of the program, and (2) some subgrantees who scored sufficiently high on the computer skills assessment did not require computer skills training. Survey respondents who reported being employed at the time of the survey expressed similar levels of satisfaction with computer skills training to those who were not employed.

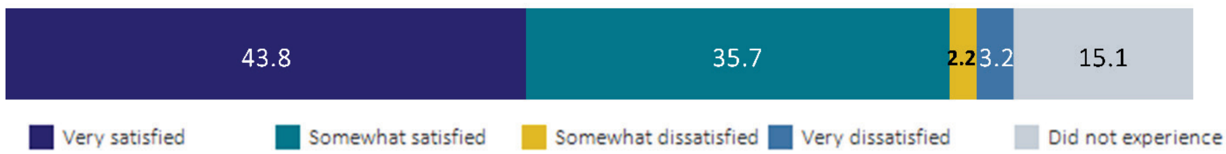
Exhibit V-5: Opinions About Computer Skills Upgrade



Finances 50+

While learning how to manage finances did not figure prominently in respondents' decisions to enroll in BTW50+: WESI, Exhibit V-6 shows that they did note satisfaction with the support they received in this area: About eight in 10 (79.5 percent) said they were either very satisfied or somewhat satisfied with the support they received in learning how to manage their finances. Small percentages reported being somewhat dissatisfied (2.2 percent) or very dissatisfied (3.2 percent) with support received in this area; a noticeably larger group (15.1 percent) did not even receive support in this area, which could be due to dropping out of the program prior to the end of core services. Survey respondents who reported being employed at the time of the survey expressed similar levels of satisfaction with financial capability training to those who were not employed. As noted in Chapter IV, subgrantees have experimented in later waves of the program with shortening core services to minimize attrition and breaking up the sequencing of Finances 50+ modules to ensure their relevance and to provide at least some training early in core services and for all respondents in a given wave.

Exhibit V-6: Satisfaction with Financial Capability Training

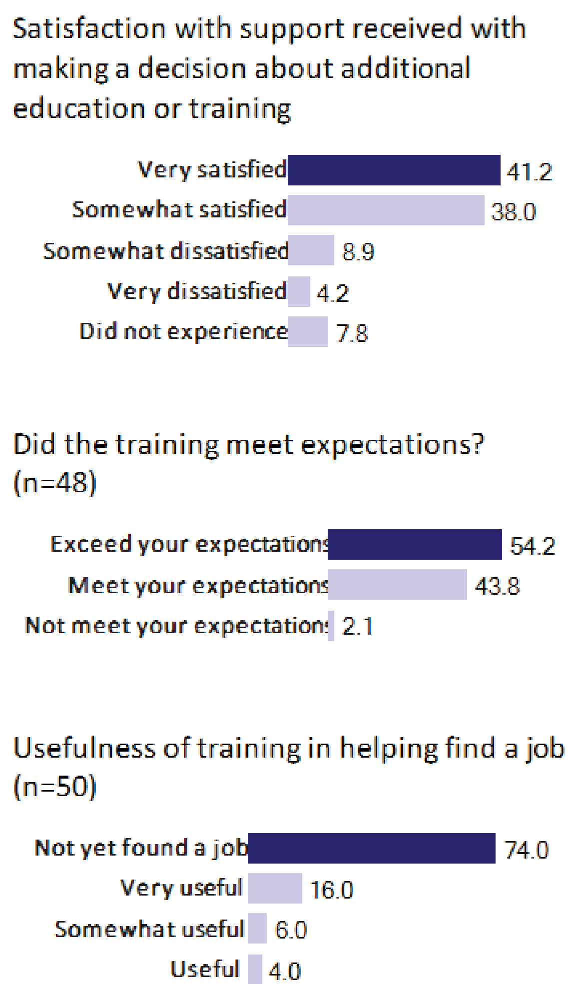


Connection to Occupational Skills Training

Respondents were generally satisfied with the support they received in making the decision to pursue additional education or training while in the program. As Exhibit V-7 shows, about eight in 10 candidates (79.2 percent) said they were very satisfied or somewhat satisfied with the support they received with making a decision about pursuing additional education or training. Fewer said they were somewhat dissatisfied (8.9 percent) or very dissatisfied (4.2 percent), and the remainder said they had not experienced support in this area (7.8 percent). For the latter group, it may be that, because occupational skills training is not required, they did not receive assistance in this area because they had not indicated interest on the initial application; as discussed later in this chapter, focus group feedback indicates a desire for more clarity in presenting the occupational skills training options throughout the core services period. There were no differences by employment status at the time of the survey with support received with making a decision about pursuing additional education or training.

Exhibit V-7 also shows that among respondents who had enrolled in

Exhibit V-7: Connections to Occupational Skills Training



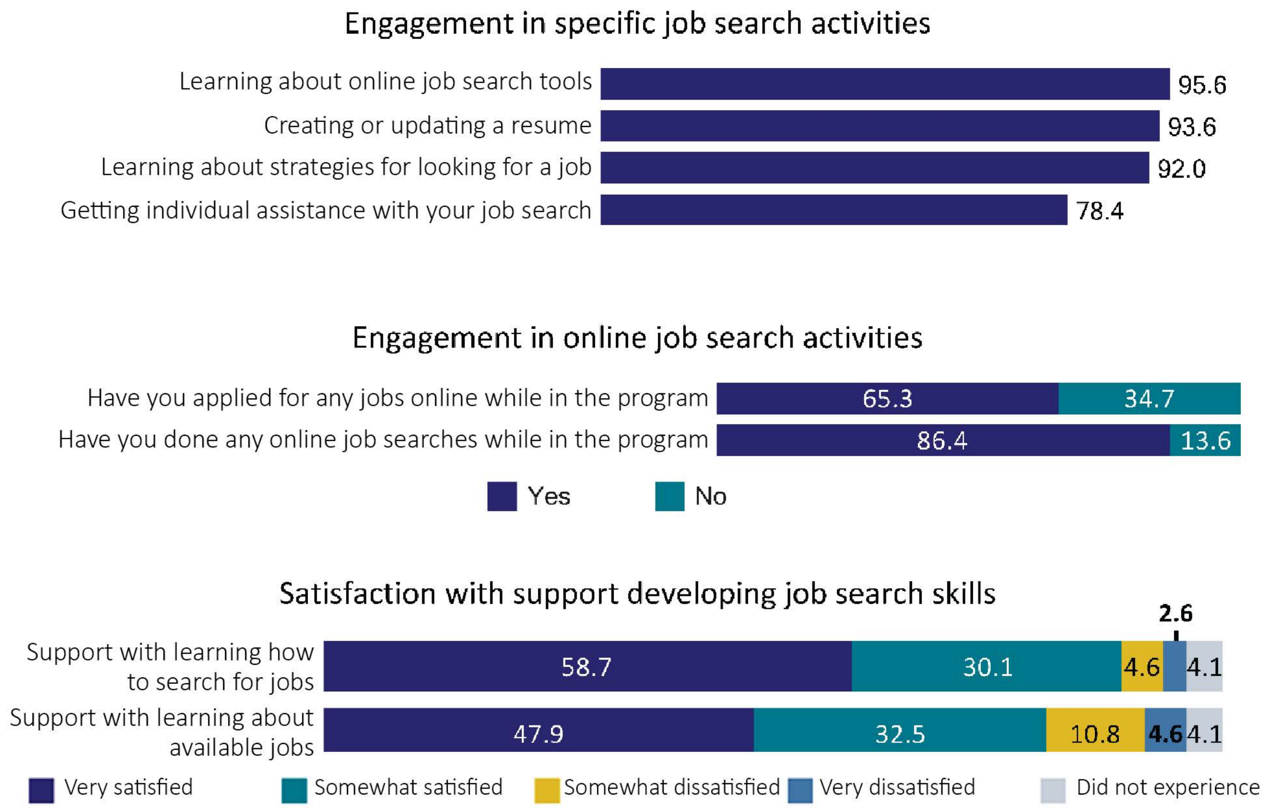
occupational skills training (n=58) and expressed an opinion on whether the training met their expectations (n=48), over half (54.2 percent) said it exceeded their expectations, about four in 10 (43.8 percent) said it met their expectations, and only a minority (2.1 percent) said it did not. When asked about how useful the training had been in helping them find a job, about a quarter of respondents (26 percent) said it was very useful (16 percent), useful (4 percent), or somewhat useful (6 percent). No candidates reported training was not useful at all, but the majority of those who went on to training (74 percent) said they had not yet found jobs, and therefore they could not yet say whether the training had been useful.

Job Search Skills

Nearly all respondents reported that they had been given opportunities to practice job search skills while in the program. As Exhibit V-8 shows, the vast majority of job candidates engaged in learning about online job search tools (95.6 percent), creating or updating a resume (93.6 percent), and strategies for looking for a job (92 percent). Although a relatively high proportion (78.4 percent) reported they had received individual assistance with their job searches, this was notably lower than reported participation in other group-based job search activities.

A large proportion of respondents reported that they had applied what they learned through the program's job search skills component. Over eight in 10 respondents (86.4 percent) said they had searched for jobs online and nearly two-thirds (65.3 percent) had applied for jobs online. Respondents expressed moderately high levels of satisfaction with the support they received in learning how to search for jobs and the support they received in learning about available jobs in the area and these levels of satisfaction did not vary by respondents' employment status at the time of the survey. As Exhibit V-8 shows, a slight majority (58.7 percent) were very satisfied with the support received in learning how to search for jobs, and just under a third (30.1 percent) were somewhat satisfied. Similarly, around half (47.9 percent) were very satisfied with the support received in learning about available jobs, and around one-third (32.5 percent) were somewhat satisfied. While satisfaction with these two components of job search skills shows, then, that most respondents are very or somewhat satisfied, it is worth mentioning that satisfaction with learning *how* to search for jobs is higher than satisfaction with support in learning about *available* jobs. This is consistent with findings in Chapter IV on limited use of labor market information in career coaching.

Exhibit V-8: Job Search Skills

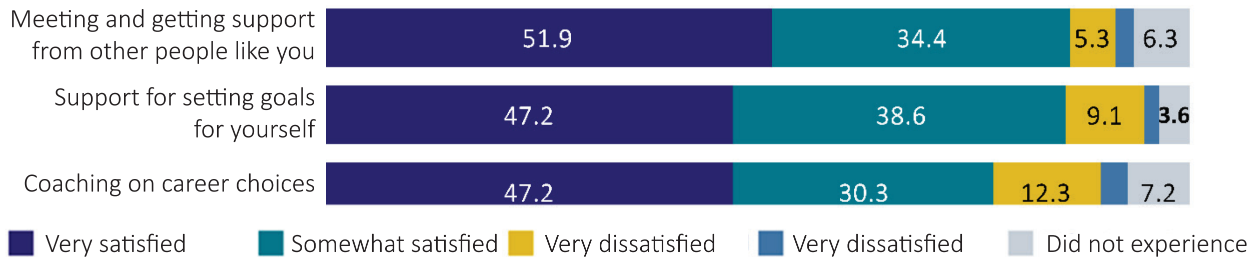


Career Coaching

Career coaching is a key aspect of the program model, and respondents reported moderately high levels of satisfaction with this component. Around half (51.9 percent) were very satisfied and just over a third (34.4 percent) were somewhat satisfied with the opportunity to meet and get support from other people like them. Similarly, around half (47.2 percent) were very satisfied and more than one-third (38.6 percent) were somewhat satisfied with support received in setting goals for themselves. Just under half (47.2 percent) were very satisfied and just under a third (30.3 percent) were somewhat satisfied with the support they received in coaching on career choices. Levels of satisfaction in this area did not differ by employment status at the time of the survey.

For all three of these aspects, around 10 percent of respondents were either dissatisfied or very dissatisfied, and small but notable percentages reported that they had not experienced this critical component. Those individuals could either have forgotten about assistance they actually did experience, dropped out before receiving this type of help, or been enrolled in the program and genuinely not experienced career coaching elements. For example, 6 percent of candidates reported that they did not experience “meeting and getting support from other people like [them],” which could indicate that they did not remember such connections, did not experience a sense of connection with others in the program, or dropped out before such a connection could be formed.

Exhibit V-9: Satisfaction with Career Coaching

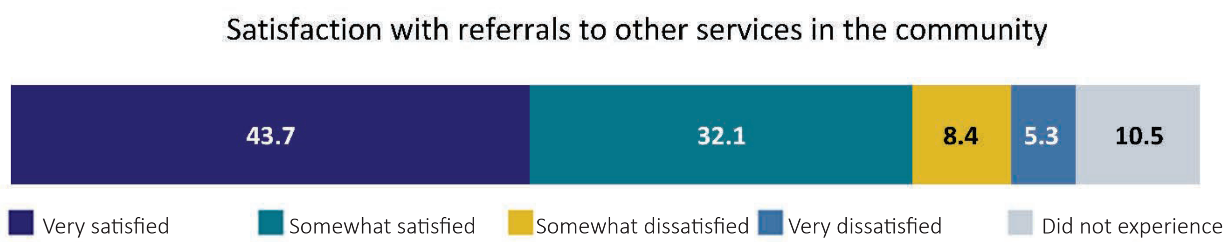


Note: Values for “very dissatisfied” scale are not depicted in the exhibit above due to very small percentages. Values include:
Meeting and getting support from other people like you: 2.1
Support and setting goals for yourself: 1.5
Coaching on career choices: 3.1

Supportive Services

As noted in Chapter IV, the program model calls for connection, as needed, to supportive services such as assistance with transportation, housing, or obtaining interview clothing. As Exhibit V-10 below shows, three quarters of respondents were either very satisfied (43.7 percent) or somewhat satisfied (32.1 percent) with the referrals they received to other services in the community. Fewer were either somewhat dissatisfied (8.4 percent) or very dissatisfied (5.3 percent). About 10 percent said they did not experience this component of core services, because they either did not remember receiving it, did not need these services, or needed supportive service referrals but did not receive them. There were also no differences by employment status at the time of the survey in regard to satisfaction with supportive services.

Exhibit V-10: Satisfaction with Supportive Services



Attitudes and Behaviors

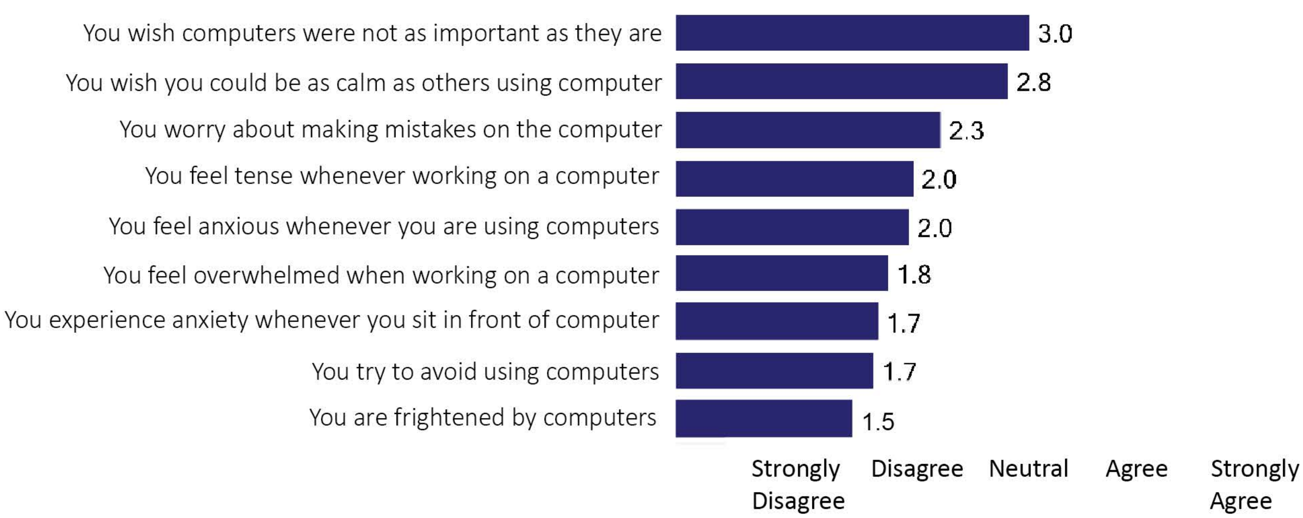
In addition to questions on program experiences, the survey also asked a series of questions to measure three constructs: computer attitudes, financial capability, and quality of life. The following sections provide a description of the survey items used in developing the scales that measure each one of these constructs. Descriptions include a summary measure of the initial items included in the scales, a note about the results of the reliability analyses, and a histogram to illustrate the distribution of respondents along different values in each of the scales. (Appendix C provides additional detail on these analyses.)

Computer Use

Because computer training is an important component of BTW50+: WESI—and because, as mentioned earlier, it is also one of the most important reasons why respondents decide to enroll in the program—the survey included several items designed to better understand candidates' attitudes toward computer use. The items included in the survey were based on a scale that has been used and validated by prior research (Wild et al., 2012). Exhibit V-11 below lists these 16 items and their respective means.

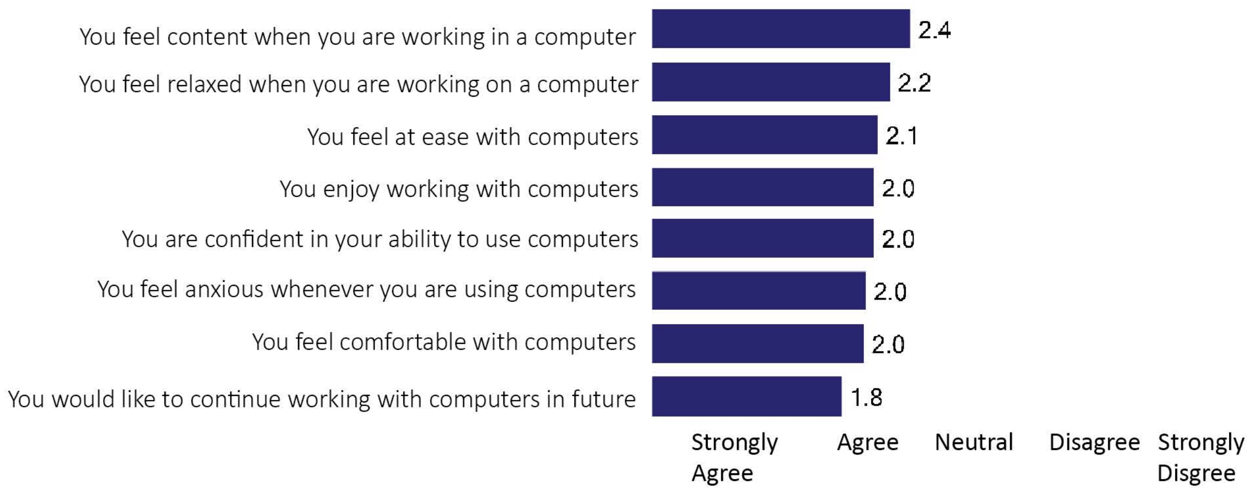
The first nine survey items were statements indicating unease with computers; the response choices were (1) = strongly disagree, (2) = disagree, (3) = neither agree or disagree, (4) = agree, and (5) = strongly agree. Lower values (less agreement) indicate that candidates feel more at ease using computers, meaning they experience less difficulty. Mean scores for these items (as shown in Exhibit V-11) show moderate (3.0) to low (1.5) agreement with the statements, indicating that candidates feel at least somewhat at ease using computers, and these scores were similar regardless of reported employment status.

Exhibit V-11: Mean Scores for Unease with Computer Use



The remaining seven items related to computer use were statements indicating comfort with using computers; for these items, the scale is reversed: (1) = strongly agree; (5) = strongly disagree. As is the case for the nine items described above, lower values (more agreement) reflect participants feeling more at ease using computers. Exhibit V-12 shows means for these items were between 1.8 and 2.4; again, these scores were similar regardless of reported employment status

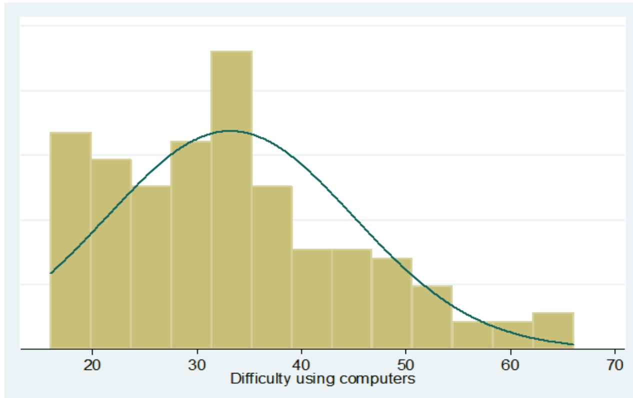
Exhibit V-12: Mean Scores for Ease with Computer Use



To measure attitudes towards computers as a construct, SPR used a scale based on the 16 items included in the survey. These 16 items were coded such that lower values indicate that respondents experience less difficulty using computers, and thus are more at ease using them. As a first step, SPR assessed whether these 16 items are reliable measures of attitudes toward computer use. Internal consistency is commonly used to assess whether survey items jointly measure the same general construct; it is based on a computation of existing correlations between those items. This correlation is expressed as the alpha coefficient, which can take values between 0 and 1, where values greater than 0.6 indicate acceptable or good degrees of internal consistency (Thorndike, 2005). Results indicate a high degree of internal consistency among the 16 items, with an overall Cronbach alpha coefficient of .9 (α=0.936).

The total sum of individuals' responses to the 16 items makes up their overall computer use scale score. As shown in Exhibit V-13, the distribution of respondents along the values of the scale is skewed to the right—an indication that they experience less difficulty using computers and feel more at ease using computers in general. As mentioned earlier in the chapter, the current analyses are limited in scope because sample sizes in the three-month follow up survey are not yet large enough for subgroup analyses, and there is not a sufficiently large cohort of respondents from the six- and 12-month surveys.

Exhibit V-13: Attitudes Towards Computer Use



Financial Capability

Another important component of the BTW50+: WESI is providing financial capability training. As such, the survey asked about the frequency (never, seldom, sometimes, often, or always) with which respondents have engaged in 11 different financial behaviors. SPR used items from the Financial Management Behavior Scale (FMBS; Dew & Xiao, 2011) because the scale was psychometrically validated in a large nationally representative sample of adults. Exhibit V-14 includes the 11 items that together serve as measure of financial capability among survey respondents.

As shown below in Exhibit V-14, most respondents said they often or always engage in positive behaviors related to short-term planning: paying their bills, comparison shopping, staying on budget, and keeping track of expenses. However, the more long-term a behavior is, and the more assets it requires, the less frequently respondents reported engaging in that behavior—only sometimes for emergency savings, paying off credit card balances in full, and saving money from each paycheck; seldom for investment in retirement or stocks and bonds. These scores were similar regardless of reported employment status

Exhibit VI-15 shows two additional items from this scale related to negative financial behaviors, with the scale reversed for ease of reading. Similar to Exhibit VI-14, responses indicate that in the short term, respondents demonstrate financial capability: On average, they seldom make just the minimum payment on a loan, and almost never max out the limit on their credit cards. Again, these scores were similar regardless of reported employment status.

Exhibit V-14: Mean Scores for Financial Capability

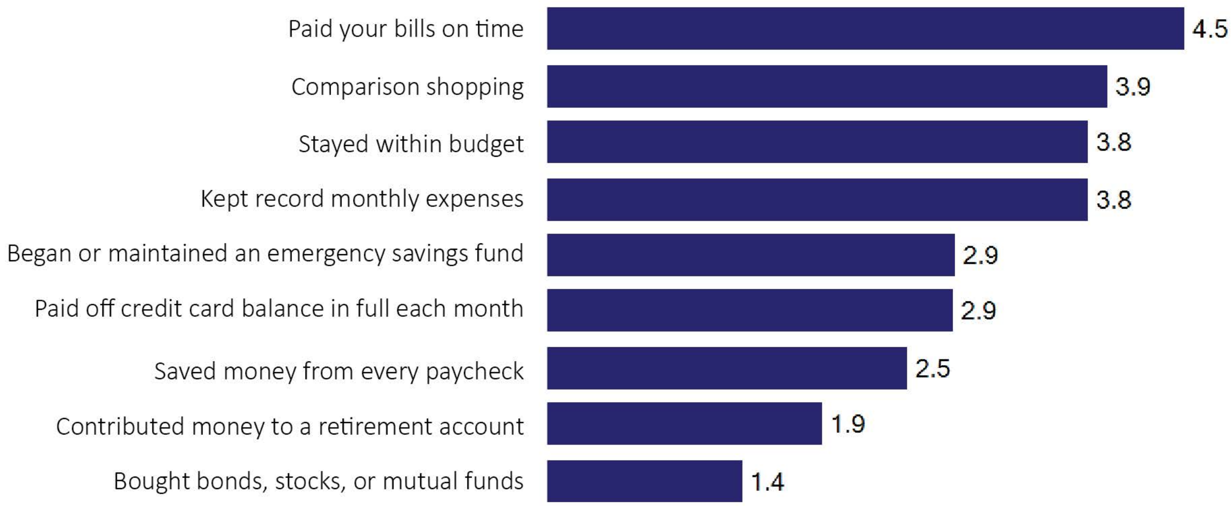
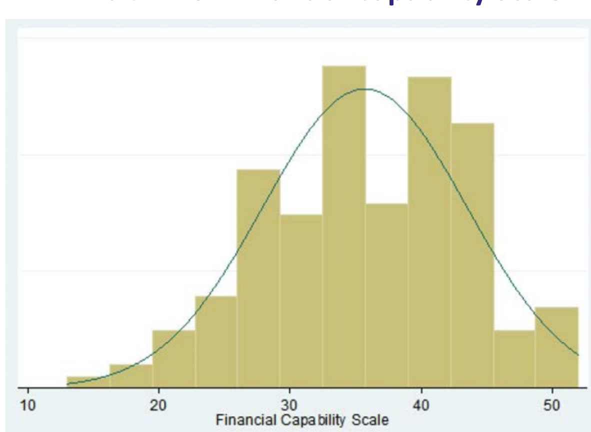


Exhibit V-15: Mean Scores for Financial Capability (Reverse Scale)

To assess the reliability of the FMBS scale in the sample of job candidates, SPR calculated the internal consistency of the scale among the 11 items. Results indicate there is high consistency among them, with a Cronbach alpha coefficient of .7 (α=0.730). The total sum of a respondent's answers on these 11 items makes up her overall financial capability score, where a higher financial capability score indicates greater financial capability. Exhibit V-16 shows that the distribution of respondents along the FMBS scale scores looks more normally distributed, with most respondents obtaining scores near the mean. It also shows that some respondents have scores in the extremes of the scales, either very low or very high with respect to others.

Exhibit V-16: Financial Capability Scale



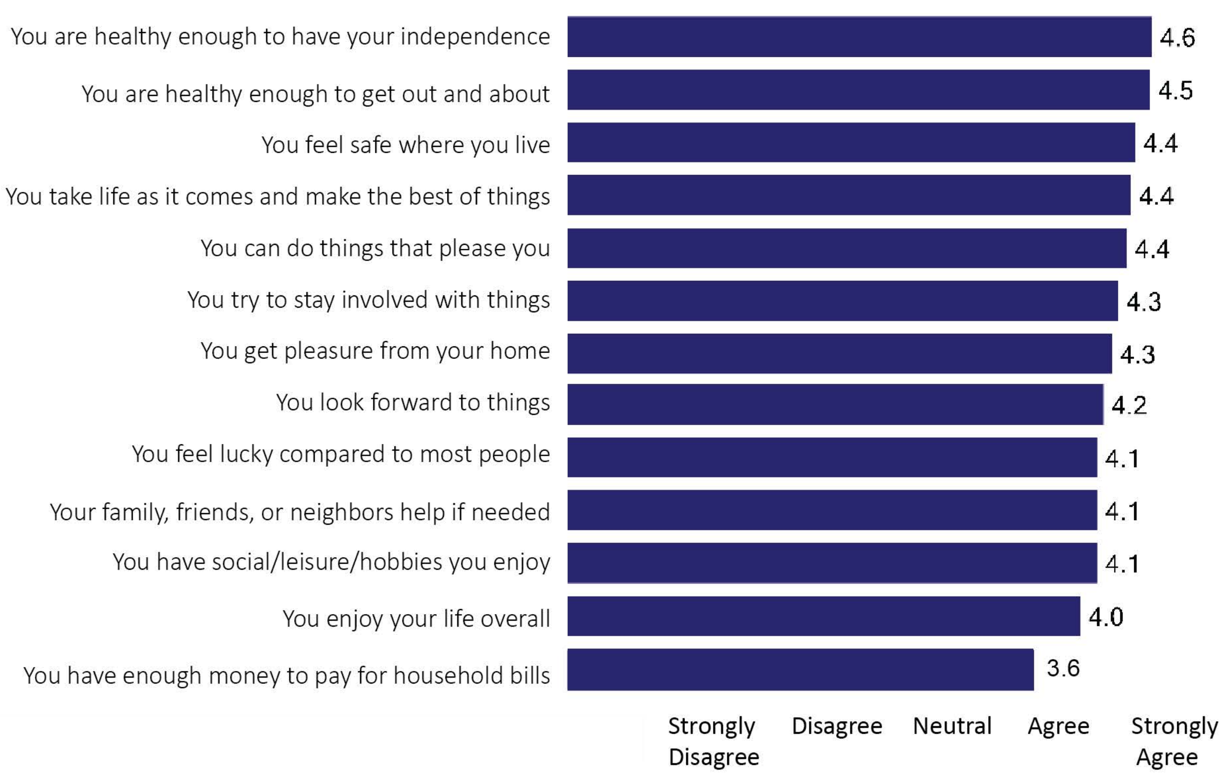
Previous empirical evidence suggests that the adoption of certain financial behaviors is gradual, with cash management developed first, then credit, savings, and finally investment management (Dew & Xiao, 2011). Because the six- and 12-month follow up surveys also include these survey items, future analyses could examine changes in financial behaviors over time.

Quality of Life

The BTW50+: WESI model encourages job candidates to develop strategies for self-care to promote higher quality of life. To measure changes in quality of life, SPR included items in the survey from the Older People's Quality of Life Questionnaire (OPQOL-brief), a scale that has been used in prior research to measure the construct (Bowling, Hankins, Windle, Bilotta, & Grant, 2013). The survey included 13 questions on the topic (see Exhibit V-17 below).

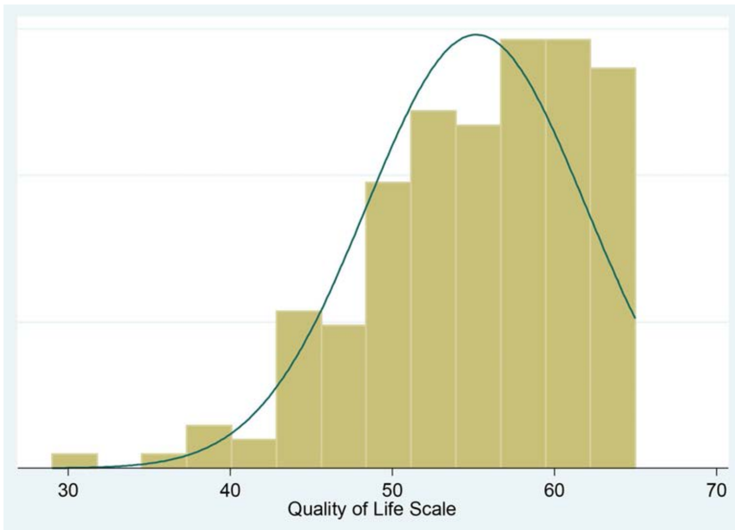
For each of the 13 items, respondents were asked to select among the following five choices: (1) = strongly disagree, (2) = disagree, (3) = neither agree nor disagree, (4) = agree, or (5) = strongly agree. The total sum of respondents' answers to the 13 items makes up their overall quality of life. Across all items, greater agreement—reflected by a higher score—indicates a higher perceived level of quality of life. As Exhibit V-16 shows, candidates reported fairly high ratings of quality of life. The mean agreement score for nearly all items was over 4.0, with the important exception of having enough money to pay the bills. None of these scores showed significant differences by reported employment status.

Exhibit V-17: Mean Scores for Quality of Life



SPR tested the degree of internal consistency among these items and concluded they possessed the necessary internal consistency to be used as a scale, with a Cronbach alpha coefficient for the 11 items of .8 (α=0.857). Exhibit V-18 shows that the distribution of respondents is skewed to the left towards higher scores on the quality of life scale, indicating most enjoy high quality of life at three months after enrollment in BTW50+: WESI.

Exhibit V-18: Quality of Life Scale



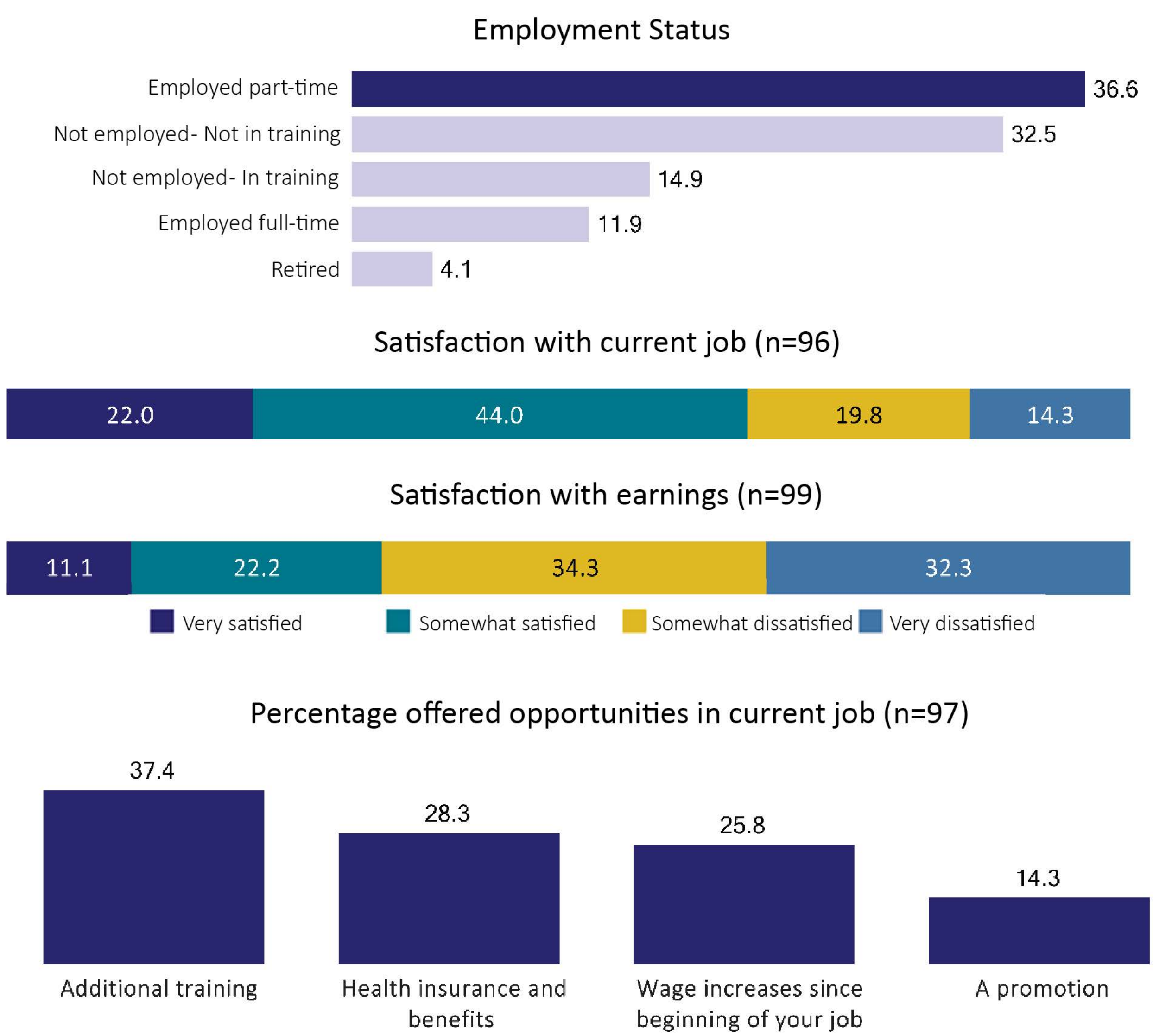
Survey items that jointly measure quality of life are also included in the six- and 12-month follow-up surveys. Once SPR obtains a sufficiently large cohort of respondents, future analyses could examine changes in how quality of life shifts over time with more distance from participation in BTW50+: WESI.

Employment Status and Satisfaction

The survey asked about candidates' employment status and, for those who were employed, their satisfaction with their current jobs. At the three-month mark, just under half of respondents (48.5 percent) reported being employed full or part time. About a third (32.2 percent) were not employed and not in training, and about one in seven (14.9 percent) were not employed or in training. An additional 4.1 percent of respondents reported that they were retired. However, at the three-month mark after enrolling in a program to reconnect to the workforce, it may be that these individuals have been unsuccessful in finding jobs and have decided to stop looking. (It is also important to note that, at the time individuals were surveyed, they had generally completed core services within the past six weeks, and later analyses of six- and 12-month survey data may show higher employment rates given that more time will have elapsed since the start of their job searches).

As Exhibit V-19 shows, among those who were employed, just under half (44 percent) were somewhat satisfied, and less than a quarter (22 percent) were very satisfied. Satisfaction was generally lower for earnings, with two-thirds of respondents reporting that they were either very dissatisfied (32.3 percent) or somewhat dissatisfied (34.3 percent) with their earnings. When asked, most candidates said they had not been offered additional benefits or opportunities for advancement in their current jobs: Slightly over a third of respondents (37.4 percent) said they were offered training opportunities, 28.3 percent said they were offered health insurance and benefits, 25.8 percent said they were offered wage increases since beginning their jobs, and only 14.3 percent said they were offered promotions. However, at the three-month mark after enrollment, most respondents likely had not been in their positions very long. Later analyses of six- and 12-month survey responses will provide a more complete long-term understanding of job quality and benefits after program participation.

Exhibit V-19: Employment Status and Satisfaction



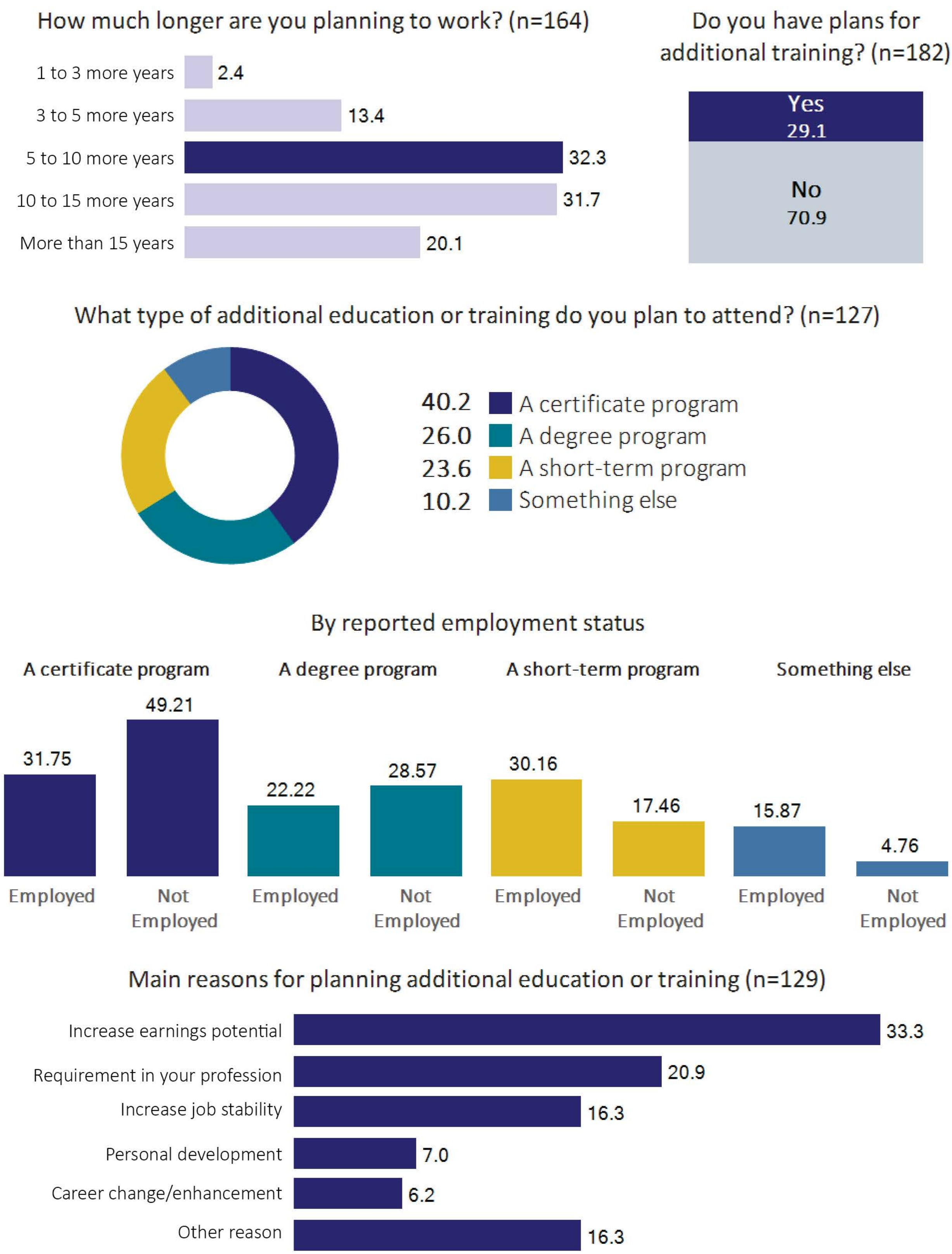
Plans for Future Training and Employment

Finally, the survey asked respondents about their plans for the future. As shown below in Exhibit V-20, most said that they envision long-term continued participation in the labor force. Two-thirds plan to work either between five and 10 years (32.3 percent) or between 10 and 15 years (31.7 percent). About one in five (20.1 percent) plan to work more than 15 years and fewer (15.8 percent) said they plan to work five years or less. Respondents' estimates about their continued participation in the labor force were similar between candidates who reported being employed at the time of the survey and those who reported not being employed.

Pursuing additional occupational skills training is also among respondents' plans for the future. A majority (70.9 percent) said they are planning to pursue additional education or training. Candidates expressed interest in various types of additional education or training. Exhibit V-19 shows that about four in 10 (40.2 percent) said they are interested in certificate programs, and about a quarter each are interested in degree programs (26 percent) and short-term programs (23.6 percent). However, anticipated plans differed for job candidates who reported being employed at the time of the survey compared to those who were not. While similar proportions of both groups expressed interest in *any* future training, those who reported being employed were more likely to be interested in short-term training (30.1 percent) than those who reported not being employed (17.5 percent), which may be due to employed respondents' eagerness to limit time out of the workforce. By contrast, those who said they were not employed expressed more interest in pursuing certificate programs (49.2 percent) and degree programs (28.6 percent) than those who reported being employed (31.8 percent of whom expressed interest in certificate programs and 28.6 percent of whom expressed interest in degree programs.

Respondents also cited a variety of reasons for planning additional education or training including to increase their earnings potential (33.3 percent), because training is required in their professions (20.9 percent), and, for a smaller group, to increase job stability (16.3 percent). The remainder cited other reasons such as continuing personal development or changing or enhancing their careers.

Exhibit V-20: Plans for the Future



Focus Group Feedback

To complement the survey results presented above, SPR conducted in-depth qualitative data collection—specifically, focus groups held during each implementation study site visit—to learn about the job candidate experience. This section presents data from focus groups conducted during the second round of implementation study site visits, both because these data are more recent and because those visits included all six subgrantees.[18] During these second-round visits, site visitors spoke with a total of 30 job candidates who had recently completed core services. Between two and six job candidates attended each focus group, and site visitors learned about participants' experiences in the program in more depth. The opinions expressed in these groups largely aligned with the survey findings on satisfaction with various components of the BTW50+: WESI program. The main area in which focus group data enriches the survey findings is that the intimate format enabled site visitors to solicit recommendations on how to improve aspects of the BTW50+: WESI program.

Focus Group Participants' Assessment of BTW 50+: WESI

Consistent with survey findings, most job candidates in the focus groups expressed satisfaction with the career coaching they received in the program. For the most part, job candidates praised both the individual and group coaching sessions. For instance, one job candidate said, "The program has great coaches! The mock interview helped us connect with each other and share experiences. I no longer feel like I'm the only one in this situation." Focus group feedback indicates that career coaches help promote connectedness among job candidates, provide emotional support, and build job candidates' self-confidence. As a job candidate stated, "[The career coaches] care, you know. It's not like, 'well, what are you doing here? I don't have time to help you.' They are good encouragers." However, consistent with findings in Chapter IV on the challenge of providing sufficiently intensive coaching with limited staff, job candidates at one subgrantee felt their career coach was stretched too thin. These candidates wished their coach had spent more individual time helping them build their resumes.

Survey findings and focus group feedback both indicate job candidates place a high value on the peer support system they build while in the program. Job candidates reported that their peer support system helped boost their confidence to approach the job search process. One shared that "the connection [she] made with the rest of the class was wonderful." She described her connection with other job candidates as a "sisterhood" and shared that the program gave her a lot of emotional support. Another shared: "It was helpful to know other people were doing the same activities and still not getting jobs." Several job candidates expressed that BTW50+: WESI was instrumental in building the self-confidence they needed to seek employment and that they have stayed in touch with their peers after the end of core services.

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18 JSCC and MDC were not brought into the grant until after the first-round site visits, and have therefore only had one focus group to date.

While job candidates in the focus groups planned to enroll or were already enrolled in occupational skills training (consistent with survey findings on plans for future training), feedback about the *connection* to training programs indicates uneven access across subgrantees. Some job candidates were encouraged by their career coaches to take assessments and felt supported by them in selecting their training programs. However, at one subgrantee site, job candidates shared that while career coaches encouraged them to take assessments, they did not individually discuss assessment results. Furthermore, at two subgrantee sites job candidates felt that program staff did not promote occupational skills training opportunities early or clearly enough. Some learned about these opportunities during the last week of core services, and others seemed confused even during the focus group about whether the program was supposed to have been connecting them to occupational skills training.

As survey results also indicate, job candidates who accessed funding to enroll in occupational skills training were very appreciative, but still struggled to pay for training. Several job candidates shared that the scholarships they received to enroll in training had exceeded their expectations. At one site, however, job candidates expressed dissatisfaction that BTW50+: WESI was not funding occupational skills training for the winter term (due to the matched funding source for scholarships expiring at the end of the calendar year). These job candidates did not know how they would pay for tuition and could not envision completing their occupational skills training without this support. In addition, some job candidates reported that scholarships were not enough to pay for training costs beyond tuition, for example for books and course materials. To support themselves while in training, some said they sold personal items or, if available, collected unemployment benefits. Other job candidates have relied on private loans to pay for training costs.

Some job candidates who were already enrolled in occupational skills training have found it difficult to adjust to training and have sought out tutoring and other supports. Job candidates at two subgrantee sites shared that their occupational skills training has been challenging and demanding. They feel overwhelmed and some are worried that they will not pass their certification exams. In contrast, job candidates at another subgrantee are satisfied with their occupational skills training and do not seem worried about the workload. In terms of support received in training, some job candidates have taken advantage of campus-based services and have gone to the tutoring centers on campus; others have met with academic advisors. Other job candidates reported that their career coaches have followed them through training, and have helped them resolve problems that have arisen.

Focus Group Participants' Recommendations to Improve BTW50+: WESI

In general, focus group feedback indicated that job candidates are satisfied with their experience of BTW 50+: WESI. They appreciate the support they receive through the program, the support systems they have built and maintain with their peers, and the skills they have acquired through core services. However, some feel that BTW50+: WESI can do a better job maximizing the in-person format of core services. For instance, one job candidate noted that core services were mostly "just a lot of PowerPoint we could have done at home," and another said "[she] was confused the whole time [she was there] about what exactly was taking place."

Other job candidates shared that the guidebook they received during the job search skills component was self-explanatory and that the time could have been better invested in improving their resumes.

Beyond instructional format, participants in the focus groups had several additional recommendations to improve the BTW50+: WESI job candidate experience. First, they recommended that career coaches and program staff provide clearer guidance on both the availability of training and the process of accessing funding for training. Along those lines, they also suggested that career coaches encourage job candidates to take assessments when selecting occupational skills training, and individually discuss assessment results with the job candidates. Second, consistent with findings in Chapter IV on lower levels of fidelity to the employer engagement component of the model, job candidates suggested that BTW50+: WESI offer more networking opportunities with employers throughout core services. They feel that internships and job fairs could provide meaningful ways to connect with employers. Lastly, some mentioned they would like to receive help from career coaches on how to secure additional funding for training beyond scholarships available through BTW50+: WESI.

Synthesis and Conclusions

Overall, results from the three-month follow-up survey indicate that job candidates enroll in the program primarily to learn about new employment opportunities and to improve their skills through computer or other types of training, are satisfied with various components of the program, frequently engage in positive short-term financial behaviors, are relatively comfortable using computers, and enjoy a relatively high quality of life.

However, survey results do point to several areas for improvement related to employment—the primary targeted outcome of the program. First, less than half of survey respondents reported being employed, and most of these respondents are employed part time rather than full time. Regardless of employment status, most candidates anticipate continuing to work for at least five more years, underscoring the importance of both obtaining employment and feeling satisfied with their work, given plans for long-term labor market participation. Second, while job candidates are generally satisfied with the job search skills component, the lowest satisfaction scores for that component concern learning about available jobs. Given that learning about new employment opportunities is an important reason why job candidates enroll in the program in the first place, it would be worthwhile to strengthen the use of labor market information both to guide them in learning about available jobs and to evaluate their needs for training.

Survey findings and focus group feedback coincide along several dimensions: both show that job candidates are generally satisfied with the BTW 50+: WESI program and value the peer support system they have built and continue to maintain. However, feedback from focus groups indicates there may be areas for improvement in the delivery of BTW 50+: WESI core services in various forms, particularly the mode of instruction and communication about the availability of funding for occupational training.

Chapter VI: Conclusion

This chapter synthesizes the findings presented in earlier chapters to emphasize key findings, highlight themes of program implementation to date, and identify implications of the findings for the impact study. The chapter concludes with next steps for the initiative and the evaluation.

Key Findings

The first two rounds of implementation study site visits and an initial analysis of three-month follow-up surveys surfaced the following key findings, as described earlier in this report:

- **AARP Foundation provides significant technical assistance to subgrantees, both by providing standardized curricula and materials, and maintaining and developing channels for facilitated communication between subgrantees on best practices.** Primary areas where AARP Foundation efforts provide structure and support to programs include marketing and outreach support, the 7 Smart Strategies workshop materials, and the Finances 50+ curriculum. Key practices for facilitating subgrantee communication include regular one-on-one and group conference calls, an online collaboration platform, and an annual in-person Learning Exchange.

- **The SIF grant's cash match requirement has been challenging for subgrantees to meet.** Subgrantees are required to provide a 1:1 cash match to their subgrant amount in order to receive reimbursement for grant expenses. This necessitates significant staff time and attention beyond what subgrantees had expected, despite all subgrantees having prior experience managing federal grants.

- **Due to the smaller than expected number of applicants, most subgrantees report that BTW50+: WESI enrolls most of its applicants**. Because of this, the selection criteria proposed by AARP Foundation are used more as a general guideline than a determining factor for program acceptance. Some subgrantees reported serving a more highly educated population with fewer supportive service needs than anticipated.

- **Subgrantees have fully or partially implemented most elements of the program model.** Implementation of the career coaching, computer skills training, and job search skills training elements—on which AARP Foundation provided updated guidance and technical assistance between the first and second implementation study visits—show the highest fidelity to the intended model. Subgrantees are still working towards implementation of the prescribed model on aspects of occupational skills training, supportive services, and level of employer involvement achieved.

- **While survey results indicate satisfaction with the content of most program components, focus group feedback suggests areas for improvement in format and guidance.** Survey responses show moderately high levels of satisfaction on the survey with core components of the program, though feedback from focus groups indicates more interactive and personalized delivery would be appreciated. Additionally, while a high proportion of job candidates expressed interest in continuing with occupational skills training, focus group feedback points to wide variation in the strength of connection to and guidance on training across subgrantees.

- **While job search skills training is a strong component of the program that is valued by job candidates, actual connection to employment is still in development.** Survey results indicate that job candidates enroll in BTW50+: WESI to improve their employment prospects and are satisfied with the job search skills training they receive. However, three months after enrollment, just under half of respondents reported being employed full or part time. Similarly, fidelity assessment indicates that while subgrantees have made notable progress towards full implementation of the job search skills component of the model, they have also consistently struggled to engage local employers.

Implementation Themes

The analyses of site visit, focus group, and survey data presented in this report point to several key themes in the first two years of implementation:

- **Implementation fidelity is correlated with several key factors: staff experience and stability, level of technical assistance and guidance provided, and existing infrastructure and relationships of each subgrantee.** Midway through implementation, subgrantees show the highest fidelity to the intended model on coaching, job search instruction, Finances 50+, and computer skills upgrade. Subgrantees have received guidance and connections to specific curriculum resources in these areas. By contrast, progress toward full implementation of the model was uneven for connection to occupational skills training, supportive services, and employer engagement, which rely at least to some extent on community relationships and existing infrastructure as well as connections to other college departments. Additionally, the location of BTW50+: WESI within the community college has implications for staff expertise and strength of partnerships, which in turn affects which supports and services can be readily arranged for participants.

- **Sustaining the program may prove difficult in the long term**. Despite prior experience implementing federal grants, the multi-year matched funding setup of the SIF grant has led to challenges for the stability of resources. Other than for staff time, maintaining matched funding sources year-to-year is difficult, necessitating long-term attention to sustaining the program. Most subgrantees have not yet found external (community) funding sources to match—or, in the long-term, replace—SIF funding. Moreover, many colleges are experiencing budget cuts, which means even institutional resources are more limited than when the grant was first awarded. Additionally, early implementation findings indicate that individual coaching is a key part of program success, but requires significant staff time and resources to provide.

Implications for the Impact Study

Visits to local American Job Centers (AJCs) and interviews with BTW50+: WESI staff indicate a relatively strong distinction between the services available to program participants and the services available to the planned comparison group. Distinctive services available only to the BTW50+: WESI job candidates include assessment of computer skills and access to computer skills upgrade training and delivery of financial capability training. Further distinctions in the services available to job candidates in BTW50+: WESI are that services that have been tailored to meet the needs of women over 50, in terms of the content of career coaching and job search skills training, and the emphasis on arranging for peer support.

Another feature that is intended to be distinctive for job candidates in the BTW50+: WESI model, as noted in the previous chapter, is employer engagement. To date, the subgrantees have not achieved full fidelity to the high level of employer engagement specified in the program model. Because this is an area in which AJCs are generally strong (having staff time specifically dedicated to business services and job development functions), this may reduce the differences between BTW50+: WESI and the services available to comparison group members—and, therefore, resulting employment and earnings outcomes. This underscores the importance of strengthening fidelity to (and technical assistance on) the employer engagement component of the BTW50+: WESI model.

Additionally, information gathered as part of the implementation study on recruitment, enrollment, and participant perspectives indicates that there may be differences in the background and employment history of BTW50+: WESI job candidates and members of the comparison group who have sought services from the public workforce system. As noted in Chapter III, career coaches reported that job candidates tend to have more employment experience and formal education than anticipated, and visits to local AJCs indicate that, at least for some subgrantees, the workforce system is serving a harder-to-employ population than BTW 50+: WESI. For this reason, it will be important for the impact analysis to present regression-adjusted estimates that control for these differences in background characteristics.

Next Steps for the Implementation Study

The remainder of the implementation study will include three key activities:

- **Additional site visits** will assess progress towards implementing the model with fidelity, explore subgrantee plans for sustaining the program beyond the SIF grant, and continue to document other services available on campus and in the community to ensure appropriate context for the impact study.
- **Follow-up surveys** at three, six, and 12 months after enrollment will continue for all job candidates who enroll through the end of program implementation.
- **A final implementation study report** will analyze all site visit and focus group data, follow-up survey data, and program dosage and outcome data from the FIS.

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Appendix B: Fidelity Checklist

Fidelity Checklist (College Name/Site Visit Date:)

Site visitor instructions: Insert name of college and date of visit above, and print out two versions prior to your visit. Fill this form out with the program manager while on site. Provide the BTW50+ WESI program manager with a version so he or she can look at it also as you fill it out.

This tool tracks fidelity to best practices for employment and training programs designed for older workers as well as to the BTW50+ WESI model as outlined by the AARP Foundation. The key elements include (1), assessment and career coaching (2), computer skills training (3), financial capability building (4), job search skills training (5),arranging employer access , and (6) providing academic advising and arranging occupational skills training. <u>The assumption of the tool is that in the beginning stages most of these elements will either not be implemented, or they will be partially implemented, but that over time implementation of required or best practices will increase</u>. Results will be used to inform peer learning and technical assistance efforts, including for the project learning community.

Core Element 1: Initial Assessment and Career Coaching

1.1	**Coaching provides a sequence of activities that help job candidates assess their skills and interests, identify transferable skills, and focus on career paths they want to pursue.**	
How are they meeting this goal? ☐ Career coach conducts assessments and skill and interest inventories of job candidates starting at the first individual coaching session. These assessments and inventories are used to determine occupations of interest as well as appropriate training and job search skills services. ☐ Using the above assessments and inventories, the job candidate creates an activity plan that includes realistic, achievable goals. This plan is revisited and updated as job candidate needs change.	☐ Career coach offers recommendations for appropriate career paths using up-to-date labor market information and suggests career paths that are in-demand, appropriate for older workers, and that provide the level of income needed by the job candidate. ☐ Career coaches encourage job candidates to apply for scholarship support or other programs (such as WIOA) that may help them achieve their career goals. ☐ Other. Specify:	
Rating:	☐ Fully Implemented	College has procedures in place to ensure that each job candidate is assessed for training and job search skills needs, that career coaches help job candidates create activity plans to reach their employment goals, and that job candidates are linked to appropriate additional programming and supportive services as needed. The college can provide examples of how these procedures have been implemented.

	☐ Partially Implemented	College can identify plans for how they will provide a sequence of activities to link job candidates to their desired career path, but they do not yet have processes for all steps or have not yet started offering everything that is planned.
	☐ Not Yet Implemented	College is still working through their plans for how they will offer these services.

Explanation of Rating:

1.2	**Coaching provides the support necessary to build job candidate confidence.**

How are they meeting this goal?

☐ Career coaches complete at least one coaching session with each cohort (for group coaching) or job candidate (for individual coaching). The intensity and duration of coaching is matched to the job candidates needs.

☐ Career coaches have experience working with older workers and/or have received training on how to best serve this population.

☐ Career coaches encourage job candidates to consider careers in fields that are nontraditional for women and provide the support and information necessary to make such a choice. **[Note that this criterion is optional]**

☐ Career coaches have the opportunity to conduct case conferencing with other career coaches or staff who have contact with candidates.

☐ Job candidates can meet individually with coaches for one-on-one support or to address sensitive/personal issues.

☐ Job candidates also have access to peer support groups/cohorts to learn from each other, share experiences, build their network, and gain confidence.

☐ Other. Specify:

Rating:	☐ Fully Implemented	College has procedures in place to ensure a minimum number of coaching sessions for each job candidate, job candidate has access to both individual and peer based support, and career coaches are experienced working with the older worker population. The college can also provide examples of how these procedures have been implemented.
	☐ Partially Implemented	College has plans in place to implement some of the above ways to build job candidate confidence, but has not yet implemented all steps or has not yet met all checkboxes.
	☐ Not Yet Implemented	College is working through how to best articulate how the coaching program provides the support job candidates need to build confidence and is still thinking through possible plans.

Explanation of Rating:

1.3	Coaches link candidates to appropriate supportive services and outside resources to help them achieve their employment and training goals.	

How are they meeting this goal?

☐ Career coaches conduct assessments to determine candidates' supportive service needs, including for housing, food, health, legal assistance, mental health needs, and financial credit, and continue to look for opportunities to meet supportive service needs as they learn more about the job candidate's situation and barriers faced.

☐ Career coaches are able to identify and work with the job candidate to develop strategies to address barriers to training and work, including transportation, child care, work clothing, books, uniforms, etc.

☐ Coaches have established relationships with primary referral agencies (the career coach contacts the organization to let staff there know that the candidate is coming and then follows up with either that organization or the participant to ensure needed services were procured).

☐ Other. Specify:

Rating:	☐ Fully Implemented	College has procedures in place to ensure candidates are assessed for any supportive services needs, as well as appropriate connections in place to provide candidates with warm referrals to meet these needs. The college can also provide examples of how these procedures have been implemented.
	☐ Partially Implemented	College has plans in place to implement some of the above ways to meet candidate supportive services needs, but has not yet implemented all steps or has not yet met all checkboxes.
	☐ Not Yet Implemented	College is working through how to best implement their supportive services vision and is still thinking through possible plans.

Explanation of Rating:

Core Element 2: Assessing Baseline and Upgrading Computer Skills

2.1	The computer skills training is tailored to the needs of each job candidate specifically and older workers generally.

How are they meeting this goal?

☐ College conducts an assessment of job candidate's current level of experience, knowledge, and skills using computers in order to place them in an appropriate skills upgrade class. This assessment covers a broad range of computer skills, including those needed for job searching, employment, and training.

☐ The level of computer skills training targeted for a job candidate is matched to the job skills required in the occupations the job candidate is targeting.

☐ The design and delivery of computer skills training takes into account the particular needs of job candidates for confidence building exercises, extra time for questions, extended time for hands-on practice, one-on-one instruction as needed (through instruction or tutoring), and a choice of the mode of training (e.g. online, blended, classroom based).

☐ Several levels of instruction can be arranged to meet the varying needs of job candidates, starting at a basic skills computer literacy workshop and working up to more advanced software classes.

☐ Other. Specify:

Rating:	☐ Fully Implemented	College has procedures in place to ensure that job candidates are fully assessed to determine their computer skill level, that there is a computer skills upgrade class that corresponds to their background and experience, and that such classes are tailored toward the needs of older workers. The college can also provide examples of how these procedures have been implemented.
	☐ Partially Implemented	College has plans to assess students and ensure they are placed in an appropriate computer skills upgrade, but they have not yet formalized the procedure and/or started the classes.
	☐ Not Yet Implemented	College is working through how to articulate clear plans for assessing students and putting them into an appropriate computer skills upgrade.

Explanation of Rating:

2.2 The curriculum of the computer skills upgrade is flexible and geared towards both job search and workplace needs.

How are they meeting this goal?

☐ The computer skills upgrade provides appropriate breadth to each job candidate, including instruction in at least three areas: to support job search (web browsing, social media, online job search sites and tools, and completing online job applications), to ensure success in training, and for use in the workplace (software most frequently used in the workplace).

☐ Trainings on special computer skills needed for specific occupations are available for candidates who need them.

☐ The computer skills upgrade allows for progress over time and builds on a stackable model. Job candidates can build on current skills and continue learning beyond the ten week core services program, if interested.

☐ Whenever possible, the program adapts and draws on existing computer training resources available in the community.

☐ The program identifies other resources for computer skills upgrades as needed (for example, through an ITA or other community resource).

☐ Other. Specify:

Rating:	☐ Fully Implemented	College has procedures in place to provide a computer skills upgrade with the kind of flexible, stackable curriculum described above. The college can also provide examples of how these procedures have been implemented.
	☐ Partially Implemented	College has plans to provide computer skills upgrades with the kind of flexible, stackable curriculum described above, but has not yet started the classes or fully implemented their plans.
	☐ Not Yet Implemented	College is working through how to articulate clear plans for providing the kind of flexible, stackable curriculum described above.
Explanation of Rating:		

Core Element 3: Financial Capability Building

3.1	**The financial capability building component includes best practices from Finances 50+, such as being interactive and geared towards the needs of job candidates who are 50 or older.**

How are they meeting this goal?

☐ The curriculum maps to Finances 50+, adapted to the local context as needed. It includes the recommended depth of instruction on:

- Setting goals and making a plan to achieve them
- Creating a budget and prioritizing needs and wants
- Understanding and managing debt and credit and consumer rights
- Maximizing credit scores
- Saving money through increasing income or reducing spending
- Recognizing the signs of a scam
- Where to turn with concerns about financial fraud or a scam
- Motivation and opportunity to put knowledge gained into action immediately to increase financial stability

☐ Real life financial examples relevant to those 50+ (retirement goal setting, social security, financial planning for health needs) are included.

☐ The program includes interactive activities.

☐ Other. Specify

Rating:	☐ Fully Implemented	College has procedures in place to provide Finances 50+ as described above or a curriculum of equivalent scope and depth and can give examples of how it has been implemented.

	☐ Partially Implemented	College has plans to provide Finances 50+ as described above, but has not yet fully implemented the plan.
	☐ Not Yet Implemented	College is working through how to articulate clear plans for providing the Finances 50+ as described above.

Explanation of Rating:

3.2	**The financial capability building component is contextualized within the local community and takes advantage of its resources.**

How are they meeting this goal?

☐ The program refers job candidates to resources in the community that assist with building savings and reducing debt.

☐ The program provides information about income supports and financial aid that may be available to job candidate.

☐ Other. Specify:

Rating:	☐ Fully Implemented	College has procedures in place to provide Finances 50+ as described above and can give examples of how it has been implemented.
	☐ Partially Implemented	College has plans to provide Finances 50+ as described above, but has not yet fully implemented the plan.
	☐ Not Yet Implemented	College is working through how to articulate clear plans for providing the Finances 50+ as described above.

Explanation of Rating:

Core Element 4: Enhancing Job Search Skills

4.1	**Career coaches are able to provide job candidates with targeted advice about job searching, have developed relationships with local employers, and are knowledgeable about recruitment, screening, and hiring practices of local employers in the occupations of interest to job candidates.**

How are they meeting this goal?

☐ Career coaches or college have established relationships with local employers in the fields of interest to job candidates and can describe what these relationships entail.

☐ Career coaches use up-to-date labor market information, and provide job candidates with details about academic skill level needed, working conditions, wages at entry level, and opportunities for advancement for the careers in which they are interested.

☐ College is connected to its local American Job Center (demonstrated through active referrals, being an eligible training provider, and/or having an AJC on site) and refers job candidates to their services as needed.

☐ Job candidates have the opportunity to connect with employers during the job search skills component through On-the-Job Training (OJT) positions, internships, presentations from employers, or job fairs.

☐ Other. Specify:

Rating:	☐ Fully Implemented	College has procedures in place to ensure career coaches are providing connections to employers as described above. College can give examples about how it has connected job candidates with employers In ways that benefit the job candidate's job search.
	☐ Partially Implemented	College has plans to connect job candidates to employers as described above, but has not yet fully implemented the plan.
	☐ Not Yet Implemented	College is working through its plans for connecting job candidates to employers as described above.

Explanation of Rating:

4.2 The program provides its own targeted support for job placement/job search skills training that is tailored to the needs of job candidates.

How are they meeting this goal?

☐ Program offers a minimum number of dedicated workshops with job search skills topics. These workshops incorporate the "7 Smart Strategies" from the AARP Foundation:

- Target local hot jobs
- Create your own personal marketing tools to impress employers
- Conquer the job application process
- Get new work experience and skills
- Meet people who know people
- Connect with organizations that find job candidates for employers
- Take time to focus on yourself

☐ Job candidates receive instruction in current job search skills, including online applications and job search sites, social media, and current resume, cover letter, and interviewing methods, either in the above workshops or through other programming offered by the college.

☐ Job candidates have access to peer support while job searching (for example, a job club or group coaching).

☐ Job candidates in both the core services and training groups have access to job search skills programming, though they may receive it at different times or through different channels. ☐ Other. Specify:		
Rating:	☐ Fully Implemented	College has procedures in place to ensure tailored job search skills training support, as described above, is provided to all job candidates. College can give examples about how this implementation has occurred.
	☐ Partially Implemented	College has plans to provide tailored job search skill training support to job candidates, but has not yet fully implemented the plan.
	☐ Not Yet Implemented	College is working through how to articulate clear plans for providing job candidates with job search training as described above.
Explanation of Rating:		
Core Element 5: Encouraging Employers to Engage with Job Candidates		
5.1	**The program engages in employer outreach and education activities to inform local employers of the value of the 50+ workforce and BTW50+ WESI job candidates.**	
How are they meeting this goal? ☐ Program staff have direct contact with employers in the fields into which job candidates hope to be hired. This includes, for example, the program hosting employer workshops, attending chamber of commerce events, and inviting employers to career fairs. ☐ The program engages with employers to help articulate skills-upgrading paths that make job candidates more likely to be considered for open positions and for direct placement into open positions (OJTs and internships are available). ☐ The program hosts hiring fairs exclusively for BTW50+ WESI job candidates or provides support and coaching to candidates before and after they attend college-wide career fairs. ☐ Other. Specify:		
Rating:	☐ Fully Implemented	College had procedures in place to ensure employer outreach. College can give examples about how this has occurred.
	☐ Partially Implemented	College has plans to conduct employer outreach, but has yet to fully implement the plan.
	☐ Not Implemented	College is working through how to articulate clear plans for conducting employer outreach as described above.

Explanation of Rating:			
Core Element 6: Academic Advising and Arranging Occupational Skills Training			
6.1	**Training options are both tailored to the needs of the job candidate population and broad enough to give them adequate choice.**		
How are they meeting this goal? ☐ Job candidates receive individual coaching from the career coach or other college staff to help them select a training that leads to employment in a field that suits their needs. ☐ Career coaches are familiar with training offerings in a wide variety of occupational areas. ☐ Targeted trainings are of interest to older workers and targeted towards their skills (trainings build on skills they may already have). ☐ Trainings target local in-demand occupations. ☐ Short trainings (8 weeks or less, as is the SSA definition) are available for those job candidates that want to get back to work quickly. ☐ Other. Specify:			
Rating:		☐ Fully Implemented	College has procedures in place to ensure that there is choice in training options, while still being tailored to the job candidate population. College can give examples about how this has been implemented.
		☐ Partially Implemented	College has plans to provide training options as detailed above, but has yet to fully implement the plan.
		☐ Not Yet Implemented	College is working through how to articulate clear plans for allowing choice in training options while still tailoring them to the job candidate population.
Explanation of Rating:			
6.2	**Support is provided to job candidates in training and is tailored to their needs.**		
How are they meeting this goal? ☐ Career coach or other support person (e.g. academic advisor) checks in with training job candidates to ensure that needs are met during training. ☐ Job candidates in training receive support from their peers (through study groups, by having training in a cohort model, by simultaneously attending cohort based coaching, etc). ☐ Job candidates in training are still connected to the greater BTW50+ WESI program (through concurrent attendance of other workshops, peer support groups, continued meetings with career coaches, etc). ☐ Other. Specify:			

Rating:	☐ Fully Implemented	College has procedures to ensure job candidates in training receive tailored support, as described above. College can give examples of how this support has been implemented.
	☐ Partially Implemented	College has plans to provide training support as detailed above, but has yet to fully implement the plan.
	☐ Not Yet Implemented	College is working through how to articulate clear plans for providing support during training.
Explanation of Rating:		

Appendix C: Survey Methodology

This technical appendix provides further details on the survey instrument and analysis process used to inform the findings presented in Chapter V.

About the Survey

The list of individuals eligible for the survey is obtained from an automated query in the Foundation Impact System (FIS) based on participants' date of enrollment in the program. Once a month, SPR reviews the query and generates a list of all individuals who have reached the three-month, six-month, and 12-month post-enrollment marks, yielding phone and email contact information for transmission to the Social and Economic Sciences Research Center (SESRC), SPR's survey subcontractor.

Each month, those who enrolled three, six, and 12 months prior are considered for the survey. SESRC sends a personalized invitation letter to each potential respondent to be surveyed during the current month. The letter informs potential respondents about the survey and invites them to complete a telephone survey. The invitation letter includes a $1 bill as a pre-incentive[19] to complete the survey. The survey questionnaires are installed on SESRC's computer-assisted telephone interview system. SESRC attempts to contact each potential respondent by telephone. After five unsuccessful attempts to contact the person by phone, SESRC stops calling for that survey. Individuals who cannot be reached at the three-month mark will still be contacted for subsequent six- and 12-month surveys.

Survey Response Rates

Forty-four percent of BTW50+: WESI participants responded to the follow-up survey three months after enrollment; the response rate is lower after six and 12 months (see Exhibit C-1). Response rates represent the number of program participants who completed or partially completed the survey divided by the number of participants SESRC attempted to contact minus those contacts considered invalid (e.g., those who are deceased or report to the interviewer that they never participated in the program).

Survey results presented in this report are based on responses to the three-month follow-up surveys exclusively, as sample sizes for the six-month and 12-month surveys are too small at this time to allow for meaningful analyses. To increase response rates in future six- and 12-month follow-up surveys, as of spring 2017 each of the six subgrantees now receives the list of job candidates who will be contacted for the survey during a given month. Coaches are able to contact these job candidates and encourage them to participate in the survey at the beginning

[19] The use of small monetary pre-incentives is recommended in the literature on survey research (see, for example, Singer and Bossarte, 2006) both because higher monetary incentives to participate in surveys can be perceived as coercive (particularly for low-income respondents) because low-income individuals respond better to lower incentives. Cash payments are used in lieu of gift cards to avoid the appearance of affiliation with any particular merchant or company.

of each month. Data from the six-month and 12-month surveys will be analyzed in 2018 for inclusion in the final implementation study report.

Exhibit C-1: Survey Response Rates

	3-month	6-month	12-month
Eligible program participants	509	405	209
Invalid contacts	11	9	2
Completed surveys	194	97	42
Partially completed surveys	27	5	3
Response rate	44.4%	25.8%	21.7%

Non-Response Bias

Given the moderate response rate for the three-month survey, the evaluation team considered the possibility of systematic differences between the survey respondents and the full pool of program participants, yielding bias in the survey findings. To estimate the extent of potential non-response bias, the evaluation team compared the background characteristics of survey respondents to those of all program participants. The pool of program participants' information on age, gender, race and ethnicity, college of attendance, and prior education was obtained from an FIS data extract provided in November of 2016. As shown below in Exhibit C-2, the differences between actual and potential survey respondents on these characteristics tended to be small and not statistically significant. Therefore, we estimate the level of non-response bias on observable characteristics to be low. However, this does not preclude the existence of other sources of non-response bias. It is possible that potential and actual survey respondents differed based on characteristics that were unmeasured (e.g., level of motivation and commitment toward the program) and that these characteristics were associated with the likelihood of responding to the survey. Depending on the final sample size and response rates for each of the surveys, subsequent analyses will likely include weighting for non-response bias.

Exhibit C-2: Comparison Between Survey Respondents and Universe

Demographic Characteristics	Percentage of Survey Respondents (n=221)	Percentage of All Job Candidates Contacted (n=509)	Difference
Age			
55 or younger	31.2	32.2	-1.0
56–58	25.8	25.0	0.8
59–62	19.9	20.0	-0.1
63–65	11.8	10.4	1.4
66 and older	10.4	11.0	-0.6
Missing	0.9	1.4	-0.5
Gender			
Female	89.1	90.2	-1.0
Male	10.9	9.8	1.0
Racial/Ethnic Background			
Black or African American	21.7	21.0	0.7
Hispanic/Latino	12.7	14.7	-2.1
White/Caucasian	57.9	56.0	1.9
Other Race/Ethnicity	6.8	5.9	0.9
Refused or N/A	0.9	2.4	-1.5
Highest Degree Completed			
High School or GED	8.1	11.0	-2.9
Some College	21.7	23.4	-1.7
Associate's Degree	10.0	10.0	-0.1
Bachelor's Degree	25.8	25.2	0.6
Master's, JD, PhD, etc.	12.7	11.0	1.7
N/A, Missing	21.7	19.5	2.3
Subgrantee			
Austin Community College	28.5	29.9	1.4
Eastern Florida State College	29.4	25.2	-4.3
Jefferson State Community College	4.1	5.5	1.4
Miami Dade College	1.4	1.2	-0.2
Santa Fe College, Gainesville, FL	15.8	19.7	3.8
Santa Fe Community College Santa Fe, NM	20.8	18.7	-2.2

Note: Chi-square tests for equality of proportions between survey participants and the universe revealed no significant differences between these two populations.

Developing Scales Measuring Attitudes Towards Computer Use, Financial Capability, and Quality of Life

The three-, six-, and 12-month surveys include items designed to measure three constructs of interest among BTW 50+: WESI job candidates: attitudes towards computer use, financial capability, and quality of life. Using results from the three-month survey of 221 participants, this section describes in more detail how the scales were developed. For each of the three scales, the section lists the survey items that made up each scale and describes the values given to candidates' responses as well as the results of the reliability assessment on whether items included in the scales should be part of the overall scale measures.

Attitudes Towards Computer Use

To understand BTW50+: WESI job candidates' attitudes towards computer use, SPR included 16 survey items measuring how they felt about using computers. SPR selected these 16 items based on previous research examining computer anxiety in older adults (Wild et al., 2012). The computer anxiety scale found in the literature appeared to be adequate for inclusion because it had a sufficient number and variety of items designed to capture respondents' subjective experiences when using a computer and all items were measured using a 5-point Likert scale. In addition, the scale had been validated by prior research using a representative sample of older adults similar to the population participating in the BTW50+: WESI program in terms of age (Hinkin et al., 1997; Wild et al., 2012).

In the three-month survey, respondents were asked the following question: "I am going to read a series of statements about computer use. For each one please tell me how much you agree or disagree that the statement pertains to you. Do you strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree with this statement?" As shown in Exhibit C-3, the 16 statements elicit respondents' feelings when using a computer.

Because of the way statements were worded, the values assigned to individuals' responses were different for items 1 through 8 and item 16. As Exhibit C-3 shows, for statements indicating unease with computer use, "strongly disagree" responses received a value of 1 and "strongly agree" responses received a value of 5. For the remainder of the statements—that is, those indicating ease with computer use—values were reversed so that "strongly agree" responses received a value of 1 and "strongly disagree" responses received a value of 5. The total sum of individuals' responses to the 16 items makes up their overall computer use scale score. Participants with lower computer use scale scores expressed less overall difficulty in using computers. In the sample used for these analyses, computer use scale scores had an average of 33.2 (*M*=33.18, *SD*=11.81) and ranged from 16 to 66 points.

Exhibit C-3: Survey Items Measuring Attitudes Towards Computer Use

Survey Items Measuring Attitudes Toward Computer Use	Responses Assigned Values				
1. You try to avoid using computers whenever possible (q14a)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]
2. You wish you could be as calm as others appear to be when they are using computers (q14b)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]
3. You feel tense whenever working on a computer (q14c)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]
4. You feel anxious whenever you are using computers (q14d)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]
5. You experience anxiety whenever you sit in front of a computer terminal (q14e)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]
6. You are frightened by computers (q14f)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]
7. You feel overwhelmed when working on a computer (q14g)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]
8. You worry about making mistakes on the computer (q14h)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]
9. You are confident in your ability to use computers (q14i)	Strongly agree [1]	Agree [2]	Neither agree nor disagree [3]	Disagree [4]	Strongly disagree [5]
10. You enjoy working with computers (q14j)	Strongly agree [1]	Agree [2]	Neither agree nor disagree [3]	Disagree [4]	Strongly disagree [5]
11. You feel relaxed when you are working on a computer (q14k)	Strongly agree [1]	Agree [2]	Neither agree nor disagree [3]	Disagree [4]	Strongly disagree [5]
12. You feel at ease with computers (q14l)	Strongly agree [1]	Agree [2]	Neither agree nor disagree [3]	Disagree [4]	Strongly disagree [5]
13. You feel content when you are working on a computer (q14m)	Strongly agree [1]	Agree [2]	Neither agree nor disagree [3]	Disagree [4]	Strongly disagree [5]
14. You feel comfortable with computers (q14n)	Strongly agree [1]	Agree [2]	Neither agree nor disagree [3]	Disagree [4]	Strongly disagree [5]
15. You would like to continue working with computers in the future (q14o)	Strongly agree [1]	Agree [2]	Neither agree nor disagree [3]	Disagree [4]	Strongly disagree [5]
16. You wish that computers were not as important as they are (q14p)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]

Note: The numbers in [] are the scores for the answers. The sum of these represents a participant's overall score on the computer use scale. A higher score denotes greater difficulty using computers.

To determine whether the 16 items in the computer scale measured the same construct, we computed inter-item correlations for all the items, shown in Exhibit C-4. These analyses help detect low correlations of items in the scale. Low correlations, typically below .4, indicate that the item(s) may not be measuring the same domain as other items included the scale (Thorndike, 2005). The last row in Exhibit C-4 shows that the overall scale reliability coefficient, Cronbach's alpha, is .9 (α=0.9362). Alpha coefficients range in value from 0 to 1 and the closer they are to 1, the more consistency there is among the items. The overall alpha for the scale of .9 suggests that all 16 items in the computer scale do reliably measure a single construct.

To improve reliability and consistency of the overall scale, one can also examine how each of the items correlates with the overall scale. Column (a) in Exhibit C-4 shows the results of these single item correlations. Except for item 16 (q14p) with a correlation of .36, all items were above the .4 threshold. As mentioned earlier, items that correlate at less than .4 may not be measuring the same construct as the other items in the scale. Column (c) in Exhibit C-4 shows how the overall alpha score for the scale would change if the item was dropped from the scale. Because this correlational assessment uses only preliminary survey data, and therefore represents a partial sample, it will be necessary to reevaluate with additional survey cases before deleting this item.

Exhibit C-4. Assessment of Survey Items Measuring Attitudes Towards Computer Use

Survey Items	Item-Test Correlation (a)	Interitem Covariance (b)	Alpha (c)
1. You try to avoid using computers whenever possible (q14a)	0.6737	0.522179	0.9333
2. You wish you could be as calm as others appear to be when they are using computers (q14b)	0.5981	0.511318	0.9375
3. You feel tense whenever working on a computer (q14c)	0.8167	0.492792	0.9293
4. You feel anxious whenever you are using computers (q14d)	0.8437	0.491589	0.9285
5. You experience anxiety whenever you sit in front of a computer terminal (q14e)	0.7089	0.51921	0.9324
6. You are frightened by computers (q14f)	0.6403	0.537935	0.9343
7. You feel overwhelmed when working on a computer (q14g)	0.7656	0.507556	0.9309
8. You worry about making mistakes on the computer (q14h)	0.7939	0.486676	0.9303
9. You are confident in your ability to use computers (q14i)	0.7849	0.502497	0.9303
10. You enjoy working with computers (q14j)	0.7307	0.515385	0.9319
11. You feel relaxed when you are working on a computer (q14k)	0.8198	0.499321	0.9294
12. You feel at ease with computers (q14l)	0.876	0.490978	0.9277
13. You feel content when you are working on a computer (q14m)	0.809	0.495232	0.9296
14. You feel comfortable with computers (q14n)	0.8641	0.501295	0.9285
15. You would like to continue working with computers in the future (q14o)	0.5135	0.544378	0.9365
16. You wish that computers were not as important as they are (q14p)	0.3639	0.546493	0.9444
Test scale			0.9362

Financial Capability

Managing personal finances is an important training component of BTW50+: WESI. For this reason, the survey asked a series of questions to better understand financial capability. The survey included 11 items designed to measure a variety of financial behaviors. Based on previous research, SPR selected survey items from the Financial Management Behavior Scales (FMBS). The initial items appeared to be adequate to measure financial capability because they included a range of short-and long-term financial behaviors and because the frequency of behaviors used a 5-point scale, which is adequate for developing scales. Moreover, previous research found that the FMBS scale displayed adequate reliability (α=0.8) in a nationally representative sample of adults (Dew & Xiao, 2011).

Survey respondents were asked the following question: "I am now going to read a list of financial activities. Please tell me how often you engaged in each activity during the last three months. In the past three months, would you say you did this activity never, seldom, sometimes, often, or always?" Exhibit C-5 lists the 11 statements included in the financial capability scale score and the value assigned to each of the responses. The statements were designed to learn about the frequency with which respondents engaged in financial management behaviors. Apart from items 6 and 7, where less frequency of the behavior indicated more financial savviness, "never" received a value of 1 and "always" received a value of 5. The total sum of a respondent's answers on these 11 items makes up her overall financial capability score, where a higher financial capability score indicates greater financial capability. In the sample used for this analysis, financial capability scores had an average of 35.7 (*M*=35.71, *SD*=7.78) and ranged from 13 to 52 points.

Exhibit C-5: Survey Items Measuring Financial Capability

Survey Items Measuring Financial Capability	Responses Assigned Values				
1. Comparison shopping (q11a)	Never [1]	Seldom [2]	Sometimes [3]	Often [4]	Always [5]
2. Paid your bills on time (q11b)	Never [1]	Seldom [2]	Sometimes [3]	Often [4]	Always [5]
3. Kept a record of monthly expenses (q11c)	Never [1]	Seldom [2]	Sometimes [3]	Often [4]	Always [5]
4. Stayed within budget (q11d)	Never [1]	Seldom [2]	Sometimes [3]	Often [4]	Always [5]
5. Paid off credit card balance in full each month (q11e)	Never [1]	Seldom [2]	Sometimes [3]	Often [4]	Always [5]
6. Maxed out the limit on one or more credit cards (q11f)	Always [1]	Often [2]	Sometimes [3]	Seldom [4]	Never [5]
7. Made only minimum payments on a loan (q11g)	Always [1]	Often [2]	Sometimes [3]	Seldom [4]	Never [5]
8. Began or maintained an emergency savings fund (q11h)	Never [1]	Seldom [2]	Sometimes [3]	Often [4]	Always [5]
9. Saved money from every paycheck (q11i)	Never [1]	Seldom [2]	Sometimes [3]	Often [4]	Always [5]
10. Contributed money to a retirement account (q11j)	Never [1]	Seldom [2]	Sometimes [3]	Often [4]	Always [5]
11. Bought bonds, stocks, or mutual funds (q11k)	Never [1]	Seldom [2]	Sometimes [3]	Often [4]	Always [5]

Note: The numbers in [] are the scores for the answers. The sum of these represents a participant's score on the financial capability scale. A higher score denotes greater financial capability.

As with the computer use scale described above, the evaluation team examined whether the 11 items in the financial capability scale measured the same construct by computing correlations for all the items. These analyses helped detect low correlations of items in the scale. Exhibit C-6 shows that the overall scale reliability coefficient, Cronbach's alpha, is .7 (α=0.7305), suggesting that all 11 items in the scale reliably measure financial capability. Nevertheless, after assessing the reliability and consistency of each of the items in the scale, it appears that the scale could be further refined. While there were correlations below .4 (items 1 and 11) in the scale, it is unclear whether removing any one item would yield a much higher alpha score for the overall scale. Alpha scores listed in column (c) in Exhibit C-6 below show that there are only marginal improvements to the scale. Based on this partial sample, the assessment suggests that the scale may need to be further refined. If this continues to be the case for the same analyses when conducted with a more robust sample, it will be advisable to examine the joint variability of all the items in the scale. These analyses will help determine whether separating items yields additional advantages to help better understand candidates' financial capability.

Exhibit C-6: Assessment of Financial Capability Survey Items

Survey Items	Item-Test Correlation (a)	Interitem Covariance (b)	Alpha (c)
1. Comparison shopping (q11a)	0.3307	0.41011	0.7394
2. Paid your bills on time (q11b)	0.6576	0.358637	0.6936
3. Kept a record of monthly expenses (q11c)	0.4473	0.381212	0.7261
4. Stayed within budget (q11d)	0.5322	0.368291	0.7077
5. Paid off credit card balance in full each month (q11e)	0.6622	0.316104	0.6891
6. Maxed out the limit on one or more credit cards (q11f)	0.4299	0.391607	0.7206
7. Made only minimum payments on a loan (q11g)	0.4021	0.39261	0.7339
8. Began or maintained an emergency savings fund (q11h)	0.6321	0.326445	0.6953
9. Saved money from every paycheck (q11i)	0.6901	0.317363	0.6807
10. Contributed money to a retirement account (q11j)	0.5855	0.347271	0.7011
11. Bought bonds, stocks, or mutual funds (q11k)	0.3601	0.411913	0.7251
Test scale			0.7305

Quality of Life

The BTW50+: WESI program emphasizes the importance of self-care and supporting services as participants engage in new employment searches. SPR included 13 survey items related to quality of life. SPR used items from the Older People's Quality of Life questionnaire (OPQOL-brief), which was originally developed to understand the perspectives of older people about their lives. Previous research has assessed the items conceptually and has validated the scale utilizing samples of older adults (Bowling et al., 2012).

All survey respondents were asked the following question: "I am going to read a series of statements about quality of life. For each one, please tell me how much you agree or disagree that the statement pertains to you. Do you strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree with this statement?" As shown in Exhibit C-7, the 13 statements were designed to learn about respondents' overall sense of well-being in relation to their health, social relationships, leisure activities, and financial circumstances. The values assigned to their responses on the 5-point agreement scale sum to their overall quality of life score.

Exhibit C-7 lists the 13 statements included in the quality of life scale. For all 13 items, "strongly disagree" received a value of 1 and "strongly agree" received a value of 5. The total sum of respondents' answers to the 13 items makes up their overall quality of life, where higher scores indicate higher quality of life. In the sample used for these analyses, overall quality of life scale scores had an average of 55.18 (*M*=55.18, *SD*=6.73) and ranged from 29 to 65 points.

Exhibit C-7: Survey Items Measuring Quality of Life

Survey Items Measuring Quality of Life	Responses Assigned Values				
1. You enjoy your life overall (q13a)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]
2. You look forward to things (q13b)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]
3. You are healthy enough to get out and about (q13c)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]
4. Your family, friends, or neighbors would help you if needed (q13d)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]
5. You have social or leisure activities or hobbies that you enjoy doing (q13e)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]
6. You try to stay involved with things (q13f)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]
7. You are healthy enough to have your independence (q13g)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]
8. You can do things that please you (q13h)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]
9. You feel safe where you live (q13i)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]
10. You get pleasure from your home (q13j)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]
11. You take life as it comes and make the best of things (q13k)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]

Survey Items Measuring Quality of Life	Responses Assigned Values				
12. You feel lucky compared to most people (q13l)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]
13. You have enough money to pay for household bills (q13m)	Strongly disagree [1]	Disagree [2]	Neither agree nor disagree [3]	Agree [4]	Strongly agree [5]

Note: The numbers in [] are the scores for the answers. The sum of these represents a participant's score on the quality of life scale. A higher score denotes a higher quality of life.

Exhibit C-8 shows the information used to examine the correlations for all 13 items. The overall scale reliability coefficient, Cronbach's alpha, is .8 (α=0.8579), suggesting that all 13 items in the scale reliably measure quality of life. After assessing the reliability and consistency of each of the items in the scale, shown in column (a) of Exhibit C-8 below, the evaluation team found no correlations below .4 in the scale. Thus, at this point there is no need to consider removing any quality of life survey items.

Exhibit C-8: Assessment of Quality of Life Survey Items

Survey Items	Item-Test Correlation (a)	Interitem Covariance (b)	Alpha (c)
1. You enjoy your life overall (q13a)	0.7598	0.2111411	0.8361
2. You look forward to things (q13b)	0.7539	0.2184462	0.8371
3. You are healthy enough to get out and about (q13c)	0.5284	0.2431155	0.8520
4. Your family, friends, or neighbors would help you if needed (q13d)	0.5067	0.2373691	0.8564
5. You have social or leisure activities or hobbies that you enjoy doing (q13e)	0.6682	0.2209811	0.8441
6. You try to stay involved with things (q13f)	0.7537	0.2218393	0.8378
7. You are healthy enough to have your independence (q13g)	0.6277	0.2391055	0.8472
8. You can do things that please you (q13h)	0.7486	0.2242616	0.8387
9. You feel safe where you live (q13i)	0.5482	0.2401333	0.8510
10. You get pleasure from your home (q13j)	0.5247	0.237378	0.8539
11. You take life as it comes and make the best of things (q13k)	0.5594	0.2376273	0.8506
12. You feel lucky compared to most people (q13l)	0.608	0.2282911	0.8485
13. You have enough money to pay for household bills (q13m)	0.4748	0.2363351	0.8668
Test scale			0.8579

Appendix D: Survey Instrument

This appendix shows the questionnaire items and skip logic for the 3-month follow-up survey, annotated with frequencies for the 221 survey responses included in Chapter V. Percentages shown may not add to 100 due to rounding.

Q01

How did you first hear about BACK TO WORK 50+at <COLNAME>?

28.6%	From an AARP newspaper or radio ad
20.0%	A friend, co-worker or family member
10.5%	College staff
4.5%	A church or other organization in the community
36.4%	Other source

Q02

We'd like to know more about your reasons for participating in BACK TO WORK 50+. One reason people enroll in programs like this is to get help with finding a job. In terms of finding a job, how important were each of the following reasons in your decision to enroll in BACK TO WORK 50+ at <COLNAME>?

(The first reason is/The next reason is . . .)

(Was this reason very important, important, slightly important or not important in your decision to enroll in the program?)

	Very Important	Important	Slightly Important	Not Important
A. Finding a job as soon as possible	46.2%	31.2%	16.3%	6.3%
B. Finding a better paying job	40.3%	20.4%	15.7%	23.6%
C. Finding a job with more hours	22.0%	18.2%	13.1%	46.7%
D. Learning about new opportunities for employment	70.2%	22.5%	5.0%	2.3%

Q03

We'd also like to know about any other reasons you enrolled in the program. How important were each of the following reasons in your decision to enroll in BACK TO WORK 50+?

(The first reason is/The next reason is . . .)

(Was this reason VERY IMPORTANT, IMPORTANT, SLIGHTLY IMPORTANT or NOT IMPORTANT in your decision to enroll in the program?)

		Very Important	Important	Slightly Important	Not Important
A.	Training for a new field	49.3%	21.0%	16.0%	13.7%
B.	Upgrading skills gained from your previous jobs	46.6%	23.3%	14.2%	16.0%
C.	Learning or improving computer skills	53.7%	17.9%	9.6%	18.8%
D	Learning how to manage your finances	21.2%	18.9%	18.0%	41.9%

Q03E

Are there any other reasons you enrolled in the BACK TO WORK 50+ program at <COLLNAME>?

74.1% Yes → "What are those reasons?" ________________________________
25.9% No → GO TO Q04

Q03F

How important was this reason in your decision to enroll in the program? **(n=163)**

84% Very important
14.7% Important
0.6% Slightly important
0.6% Or not important

{ALL CHOICES SKIP TO Q07}

Q08

What are your current employment goals?

____

____

____

____

Q09

How would you rate your current household's financial situation today, compared to how it was before you started participating in the program? Would you say it is . . .

7.8% Much better
16.1% Somewhat better
66.4% About the same
8.3% Somewhat worse
1.4% Or much worse

Q10

Next, we would like to know more about your current financial situation. Remember, all of your responses will be kept confidential. I am going to read a list of financial concerns and for each one please tell me how concerned you are.

(The first one is/the next one is . . .)

Are you NOT AT ALL CONCERNED, A LITTLE CONCERNED, SOMEWHAT CONCERNED, or VERY CONCERNED about this aspect of your current financial situation?

		Not at all Concerned	A Little Concerned	Somewhat Concerned	Very Concerned
A.	Basic food and clothing needs	49.5%	19.0%	16.7%	14.8%
B.	Monthly rent or mortgage payments	35.5%	15.0%	22.0%	27.6%
C.	Transportation expenses	37.7%	19.1%	25.6%	17.7%
D.	Monthly payments on loans or credit balance	39.6%	14.2%	17.9%	28.3%
E.	Long-term savings	14.1%	12.7%	19.2%	54.0%
F.	Retirement planning	16.0%	9.4%	16.5%	58.0%
G.	Heath care costs	18.6%	10.2%	22.3%	48.8%
H.	Education or career advancement costs	28.6%	17.8%	25.8%	27.7%

Q10I

Are there any other concerns you have about your current financial situation?

31.2% Yes → "What are those concerns?" ______________________
68.8% No → GO TO Q11

Q10J

How concerned are you about this aspect (Q10I) of your financial situation? **(n=67)**

0.0% Not at all concerned
3.0% A little concerned
14.9% Somewhat concerned
82.1% Or very concerned

Q11

I am now going to read a list of financial activities. Please tell me how often you engaged in each activity during the last three months.

(The first one/next one is . . .)

In the past three months would you say you did this activity NEVER, SELDOM, SOMETIMES, OFTEN or ALWAYS?

		Never	Seldom	Sometimes	Often	Always
A.	Comparison shopping	7.9%	10.3%	12.6%	17.8%	51.4%
B.	Paid your bills on time	1.9%	3.3%	7.4%	18.6%	68.8%
C.	Kept a record of monthly expenses	12.6%	9.8%	13.6%	12.6%	51.4%
D.	Stayed within budget	7.0%	7.0%	19.6%	30.4%	36.0%
E.	Paid off credit card balance in full each month	39.4%	7.3%	11.9%	10.9%	30.6%
F.	Maxed out the limit on one or more credit cards	76.3%	6.6%	8.6%	3.5%	5.1%
G.	Made only minimum payments on a loan	47.9%	9.0%	14.4%	14.9%	13.8%
H.	Began or maintained an emergency savings fund	37.3%	5.9%	15.7%	13.7%	27.5%
I.	Saved money from every paycheck	39.2%	14.9%	16.5%	11.3%	18.0%
J.	Contributed money to a retirement account	63.4%	10.9%	7.4%	5.4%	12.9%
K.	Bought bonds, stocks, or mutual funds	81.0%	7.8%	5.9%	2.9%	2.4%

Q12

How would you rate your overall quality of life TODAY, compared to before participating in the BACK TO WORK 50+ program? Would you say it is . . .

14.2%	Much better
28.0%	Somewhat better
48.8%	About the same
8.5%	Somewhat worse
0.5%	Or much worse

Q13

I am going to read a series of statements about QUALITY OF LIFE. For each one please tell me how much you agree or disagree that the statement pertains to you.

(The first statement is/the next statement is . . .)

Do you STRONGLY AGREE, AGREE, NEITHER AGREE NOR DISAGREE, DISAGREE or STRONGLY DISAGREE with this statement?

		Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
A.	You enjoy your life overall	34.8%	44.0%	10.6%	8.2%	2.4%
B.	You look forward to things	40.5%	43.9%	8.8%	6.3%	0.5%
C.	You are healthy enough to get out and about	60.9%	34.3%	2.4%	2.4%	0.0%
D.	Your family, friends or neighbors would help you if needed	40.2%	44.1%	6.4%	7.4%	2.0%
E.	You have social or leisure activities or hobbies that your enjoy doing	40.3%	44.2%	6.3%	6.8%	2.4%
F.	You try to stay involved with things	42.1%	49.0%	5.0%	3.5%	0.5%
G.	You are healthy enough to have your independence	60.9%	35.3%	2.4%	1.4%	0.0%
H.	You can do things that please you	49.3%	42.5%	3.9%	3.9%	0.5%
I.	You feel safe where you live	52.7%	42.0%	2.0%	2.4%	1.0%
J.	You get pleasure from your home	43.1%	46.1%	5.9%	2.5%	2.5%
K.	You take life as it comes and make the best of things	50.7%	40.4%	5.4%	3.4%	0.0%
L.	You feel lucky compared to most people	42.3%	37.3%	13.4%	5.5%	1.5%
M.	You have enough money to pay for household bills	24.1%	43.7%	12.1%	12.1%	8.0%

{IWR, IF R SAYS: "What do these questions have to do with evaluating the program" **RESPOND WITH:** "Although these questions are not direct evaluations of the program, AARP is also interested in how completing the program has affected your overall well-being as a result of the BACK TO WORK 50+ Program. "}

Q14

Next, I am going to read a series of statements about COMPUTER USE. For each one please tell me how much you agree or disagree that the statement pertains to you.

(The first statement is/the next statement is . . .)

Do you STRONGLY AGREE, AGREE, NEITHER AGREE NOR DISAGREE, DISAGREE or STRONGLY DISAGREE with this statement?

		Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
A.	You try to avoid using computers whenever possible	2.0%	4.9%	4.9%	34.5%	53.7%
B.	You wish you could be as calm as others appear to be when they are using computers	10.8%	23.2%	24.2%	20.6%	21.1%
C.	You feel tense whenever working on a computer	2.5%	11.3%	9.9%	37.9%	38.4%
D.	You feel anxious whenever you are using computers	2.5%	11.4%	5.9%	41.6%	38.6%
E.	You experience anxiety whenever you sit in front of a computer terminal	1.0%	5.0%	7.4%	38.1%	48.5%
F.	You are frightened by computers	0.0%	1.5%	5.9%	33.5%	59.1%
G.	You feel overwhelmed when working on a computer	2.0%	5.4%	9.4%	36.6%	46.5%
H.	You worry about making mistakes on the computer	2.5%	22.8%	7.9%	31.2%	35.6%
I.	You are confident in your ability to use computers	33.3%	42.6%	12.3%	9.8%	2.0%
J.	You enjoy working with computers	28.6%	49.3%	12.3%	8.9%	1.0%
K.	You feel relaxed when you are working on a computer	25.2%	44.6%	17.3%	10.4%	2.5%
L.	You feel at ease with computers	32.2%	42.1%	12.4%	11.4%	2.0%
M.	You feel content when you are working on a computer	21.4%	40.8%	18.9%	14.9%	4.0%
N.	You feel comfortable with computers	31.8%	50.7%	9.0%	6.5%	2.0%
O.	You would like to continue working with computers in the future	37.9%	53.5%	4.0%	3.5%	1.0%
P.	You wish that computers were not as important as they are	10.2%	35.5%	15.7%	21.8%	16.8%

Q15

We would like to know more about your experience as a participant in the program?

About how often do you interact with your BACK TO WORK 50+ coach at <COLLNAME>? Do you work with your coach . . .

5.5%	More than once a week
16.9%	About once a week
22.9%	About 2-3 times a month
14.4%	About once a month
17.9%	Less than once a month
15.4%	Or never → **GO TO Q17**
2.0%	Don't know → **GO TO Q17**
2.0%	Refused → **GO TO Q17**
3.0%	R says they do not have a coach → **GO TO Q17**

Q16

How often do you interact with your coach in each of the following ways? **(n=156)**

(The first is/the next is . . .)

Do you interact with your coach in this way NEVER, SOMETIMES or OFTEN?

		Never	Sometimes	Often
A.	Face to face meetings	10.3%	55.1%	34.6%
B.	Phone calls	30.3%	54.8%	14.8%
C.	Email messages	9.7%	49.0%	41.3%
D.	Text messages	81.4%	15.4%	3.2%
E.	Social media	82.7%	14.7%	2.6%

Q16F

Do you interact with your coach in any other way we haven't mentioned? **(n=156)**

11.5%	Yes → "In what other way do you interact with your coach?" ____________________
88.5%	No → **GO TO Q17**

Q16G

How often do you interact with coach in this way (Q16F)? Is it . . . **(n=18)**

0.0%	Never
66.7%	Sometimes
33.3%	Or often

Q17

Have you received information on any of the following topics from BACK TO WORK 50+ staff at <COLNAME>?

(The first is/the next is . . .)

Have you received this type of information (from BACK TO WORK 50+ staff at <COLNAME>)?

		Yes	No
A.	Types of jobs available in your area	78.5%	21.5%
B.	How to set realistic goals	71.8%	28.2%
C.	Online job search strategies	86.0%	14.0%
D.	How to market yourself to employers	85.3%	14.7%
E.	How to care for yourself during the job search process	83.5%	16.5%

Q17F

Have you received any other types of information from BACK TO WORK 50+ staff at <COLNAME>?

65.0% Yes → "What kind of information did you receive?" ______________________
35.0% No

Q18

Have you done any online job searches while in the program?

86.4% Yes
13.6% No

Q19

Have you applied for any jobs online while in the program?

65.3% Yes
34.7% No

Q20A

Which of the following best describes the training you received in the program for skills you need to look for a job?

Are you currently receiving training, have you already received training or have you not yet received training on the skills you need to look for a job?

20.5% Currently receiving training → **GO TO Q21**
52.3% Already received training → **GO TO Q21**
27.2% Not yet received training

Q20B

Do you plan to receive BACK TO WORK 50+ training in the future on the skills you need to look for a job? **(n=50)**

78.0% Yes → **GO TO Q22A**
22.0% No → **GO TO Q22A**

Q21

Which of the following activities related to looking for a job have you engaged in while in the program? **(n=141)**

(The first activity is/the next activity is . . .)

Have you engaged in this activity (while in BACK TO WORK 50+ at <COLNAME>)?

		Yes	No
A.	Creating or updating a resume	93.6%	6.4%
B.	Learning about strategies for looking for a job	92.0%	8.0%
C.	Learning about online job search tools	95.7%	4.3%
D.	Getting individual assistance with your job search	78.4%	21.6%

Q21E

Have you engaged in any other activities related to looking for a job (while in BACK TO WORK 50+ at <COLNAME>)? **(n=140)**

53.6% Yes → "What are those activities?" ___________________________
46.4% No

Q22A

Which of the following best describes the training you received in the program to learn or improve your computer skills?

Are you currently receiving training, have you already received training or have you not yet received training to learn or improve your computer skills?

15.4% Currently receiving training → **GO TO Q23**
38.3% Already received training → **GO TO Q23**
46.3% Not yet received training

Q23

Is/was this computer training TOO ADVANCED, ABOUT RIGHT or TOO EASY for you? **(n=100)**

3.0%	Too advanced
91.0%	About right
6.0%	Too easy

Q24

To what extent do you think this computer training has made you better prepared for your next job? Would you say . . . **(n=100)**

4.0%	Not at all
14.0%	A little
35.0%	Somewhat
47.0%	Or very much prepared

Q25A

Are you currently receiving training, have you already received training or have you not yet received training through BACK TO WORK 50+ on how to manage your finances?

3.0%	Currently receiving training → **GO TO Q26A**
66.8%	Already received training → **GO TO Q26A**
30.2%	Not yet received training

Q25B

Do you plan to receive BACK TO WORK 50+ training in the future on how to manage your finances? **(n=56)**

30.4%	Yes
69.6%	No

Q26A

Are you currently receiving support, have you already received support or have you not yet received support through BACK TO WORK 50+ with deciding whether to pursue additional training at <COLNAME>?

16.4%	Currently receiving support →**GO TO Q27**
45.0%	Already received support →**GO TO Q27**
38.6%	Not yet received support

Q27

Did BACK TO WORK 50+ at <COLNAME> provide you with a scholarship for your tuition for a college training program?

31.2% Yes
68.8% No → **GO TO Q34**

Q28

What is the name of the college training program in which you enrolled? **(n=58)**

_________ Name of program

Q29

When did you enroll in the college training program? **(n=58)**

___ Month _______ Year

Q30

For what type of job <did/will> the college training program prepare you? **(n=58)**

_____________ Name of job

Q31

To what extent did the training meet your expectations? Did it . . . **(n=48)**

54.2% Exceed your expectations
43.8% Meet your expectations
2.1% Or not meet your expectations

Q32

How useful was the training in helping you find a job? Was it . . . **(n=50)**

16.0% Very useful
4.0% Useful
6.0% Somewhat useful
0.0% Not useful
74.0% Or you have not yet found a job → **GO TO Q34**

Q33

How useful was the training in helping you perform the job you are currently doing? Was it . . . **(n=15)**

46.7%	Very useful
13.3%	Useful
20.0%	Somewhat useful
13.3%	Not useful
6.7%	Or you have not yet found a job → **GO TO Q34**

Q34

Next, please tell me of how satisfied or dissatisfied you are with each of the following features of the BACK TO WORK 50+ program, and just let me know if you have not experienced the feature.

(The first one is/the next one is . . .)

Are you VERY SATISFIED, SOMEWHAT SATISFIED, SOMEWHAT DISSATISFIED or VERY DISSATISFIED with this feature of the program?

		Did Not Experience	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied
A.	Coaching on career choices	7.2%	47.2%	30.3%	12.3%	3.1%
B.	Support with learning about available jobs in your area	4.1%	47.9%	32.5%	10.8%	4.6%
C.	Setting goals for yourself	3.6%	47.2%	38.6%	9.1%	1.5%
D.	Referrals to other services in the community	10.5%	43.7%	32.1%	8.4%	5.3%
E.	Support with learning how to search for jobs	4.1%	58.7%	30.1%	4.6%	2.6%
F.	Support with learning or improving computer skills	11.5%	48.4%	27.6%	6.8%	5.7%
G.	Support with learning how to manage your finances	15.1%	43.8%	35.7%	2.2%	3.2%
H.	Meeting and getting support from other people like you	6.3%	51.9%	34.4%	5.3%	2.1%
I.	Support with making a decision about additional education or training	7.8%	41.2%	38.0%	8.9%	4.2%

Q34J

Are there any other features of the BACK TO WORK 50+ program that you experienced and I haven't already mentioned?

25.8% Yes → "What are they?" ___________________________
74.2% No → **GO TO Q35**

Q34K

How satisfied are you with <Q34J>? Are you VERY SATISFIED, SOMEWHAT SATISFIED, SOMEWHAT DISSATISFIED or VERY DISSATISFIED with this feature of the program? **(n=49)**

71.4% Very satisfied
8.2% Somewhat satisfied
8.2% Somewhat dissatisfied
12.2% Or very dissatisfied

Q38A {ASK IF Q27=1}

Now I would like to ask a few questions about your current program and employment status. Have you moved on to any additional education or training? **(n=52)**

51.9% Yes → "What is that training?" _________________ → **GO TO Q39**
48.1% No → **GO TO Q40**

Q38B {ASK IF Q27<>1}

Now I would like to ask a few questions about your current program and employment status. Are you currently in school? **(n=139)**

12.2% Yes
87.8% No → **GO TO Q40**

Q39

When do you expect to complete this additional education or training?
_______ Month ______________ Year

Q40

What is your current employment status? Are you . . .

11.9% Employed full-time
14.9% Employed part-time but not looking for full-time work
21.6% Employed part-time but looking for full-time work
35.6% Not employed but looking for work → **GO TO Q50**
10.3% Not employed and not looking for work → **GO TO Q50**
4.1% Retired → **GO TO Q50**
1.5% Or something else -->"What is that?" ____________________ → **GO TO Q50**

Q41

What is your current job title?

_______________________________ Job title

Q42

Who is your current employer?

_______________________________ Employer name

Q43

What type of job is this? Can you describe it for me?

____

Q44

About how many hours per week do you work in an average month?

___________ Hours per week

Q45

What are your gross hourly/monthly/yearly earnings (before taxes)?

_____________________ $ per hour/month/year

Q46

How secure or insecure is your current job? Would you say it is . . . **(n=99)**

21.2%	Very secure
45.5%	Somewhat secure
16.2%	Somewhat insecure
17.2%	Or very insecure

Q47

Which of the following opportunities have been offered to you in your current job?

(The first one is/the next one is . . .)

Was this opportunity offered to you in your current job? **(n=97)**

		Yes	No
A.	Health insurance and other benefits	28.9%	71.1%
B.	Wage increases since beginning of your job	26.6%	73.4%
C.	Additional training	35.4%	64.6%
D.	A promotion	13.5%	86.5%

Q47E

Were there any other opportunities offered to you in your current job? **(n=97)**

18.6% Yes → "What were those opportunities?" ___________________________
81.4% No

Q48

How satisfied are you with your current employment? Are you . . . **(n=96)**

21.9% Very satisfied
43.8% Somewhat satisfied
20.8% Somewhat dissatisfied
13.5% Or very dissatisfied

Q49

How satisfied are you with your earnings? Are you . . . **(n=99)**

11.1% Very satisfied
22.2% Somewhat satisfied
34.3% Somewhat dissatisfied
32.3% Or very dissatisfied

Q50

Now I would like to ask a few questions about your future plans.

Do you have plans for any additional education or training? **(n=182)**

70.9% Yes
29.1% No → **GO TO Q53**

Q51

What type of additional education or training do you plan to attend? Is it . . . **(n=127)**

23.6% A short-term program
40.2% A certificate program
26.0% A degree program → "Which degree program?" ______________________
10.2% Or something else →"Could you describe this additional training for me?" ______________

Q52

What is your main reason for planning additional education or training? Is it . . . **(n=129)**

33.3%	Increase earnings potential
16.3%	Requirement in your profession
20.9%	Increase job stability
7.0%	Personal development
6.2%	Career change/enhancement
16.3%	Or some other reason → "What is that reason?" __________________

Q53

How much longer are you planning to work? Would you say . . . **(n=164)**

2.4%	1 to 3 more years
13.4%	3 to 5 more years
32.3%	5 to 10 more years
31.7%	10 to 15 more years
20.1%	More than 15 more years

Q54

That is my last question. I would like to thank you for taking the time to speak with me today. You are one of the first program participants we have interviewed for this survey. I'd like to ask if you had any comments or concerns about the survey itself. Were there things you felt we may have missed or were the some questions that were worded awkwardly? Also, if you have any comments about the BACK TO WORK 50+ program or about this survey, I can note them now.

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