

2Gen Tool Cover Sheet

Tool	Tip Sheet: Retaining clients in workforce and training programs
Description	<p>This tip sheet highlights strategies that Strengthening Working Families Initiative (SWFI) grantees can use to help maximize the engagement and retention of participants. The document presents tips and examples from SWFI grantees and other related programs in the following areas: building relationships with participants, structuring programs to meet participants' needs, and using behavioral interventions to keep participants engaged.</p>
Adapting the Tool	<p>This tip sheet was created for SWFI grantees, but can be adapted for other organizations.</p> <p>The brief offers tips in three categories.</p> <ul style="list-style-type: none">• building relationships with participants,• structuring programs to meet participants' needs, and• using behavioral interventions to keep participants engaged. <p>The categories are universal, but the tips are specific to SWFI grantees. Adapt the tool by adding specific tips to reach your target audience.</p>



Strengthening Working Families Initiative

A Tip Sheet on Retaining and Engaging SWFI Participants

A common challenge for education and training programs is engaging and retaining participants after recruitment. Participants may find that training programs are too long or too challenging, or life events may cause them to drop out. This tip sheet highlights strategies that Strengthening Working Families Initiative (SWFI) grantees can use to help maximize the engagement and retention of participants. We present tips and examples from SWFI grantees and other related programs in the following areas:



Building relationships with participants



Structuring programs to meet participants' needs



Using behavioral interventions to keep participants engaged

Build relationships with participants



Relationships and connections are key to retaining and engaging participants. Participants will be more likely to stay in a program when they feel connected to staff and other participants. Grantees can use the following strategies to build participant relationships:

- **Provide intensive intake and case management.** SWFI grantees can provide participants with intensive case management. For example, SWFI grantee OAI, Inc. requires participants to meet individually with the program manager and career coach as part of their new foundational skills workshop. Staff have noticed increases in participant engagement since making this a requirement. In the Strengthening Healthy Marriage initiative, an earlier federal program, family coordinators were responsible for maintaining contact with couples. They followed up if couples missed workshops and connected couples to community resources to address their barriers and stressors. This initiative achieved high rates of participation for this kind of program.¹
- **Use navigators to help participants access supportive services.** Understanding participants' needs and helping them access supportive services can help address barriers to SWFI participation. For example, San Diego Workforce Partnership, Inc., a Health Profession Opportunity Grantee, uses staff observation time and participant self-disclosure forms to identify potential issues to completing training among TANF participants.²

¹ https://www.mdrc.org/sites/default/files/shm%20impl%20full%20pdf_1.pdf

² https://www.acf.hhs.gov/sites/default/files/ofa/hpog_tanf_paper_final_508.pdf



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- **Use Early Alert Systems to identify potential issues.** Identifying participants' challenges early can help participants stay on track in their training program. For example, Edmonds Community College has a system in which instructors can report students who are not making satisfactory progress. Students are notified of concerns by a letter or a phone call from Student Services personnel offering resources and support.³
- **Create support groups or program buddies to build connections among participants.** Grantees can create opportunities to build peer connections that can enhance participant engagement. Support groups can also help participants gain self-confidence and become comfortable in new social settings.⁴ For example, Buffalo & Erie Workforce Development Consortium, a Health Profession Opportunity Grantee, offers a twice-a-month peer support group for participants to share progress and learn from each other's experiences in their licensed practical nurse and medical billing programs.⁵ Some evidence suggests that students in smaller Adult Basic Education classes may be retained longer than students in larger classes.⁶
- **Use social media to build and maintain relationships.** Grantees could create electronic support groups for staff and participants, using the social media platforms most common among their program participants. Staff could use these to provide reminders to participants about due dates and employment resources. Participants could also provide resources and share challenges and encouragement. Electronic support groups are often used in health care and participants report such groups have a positive impact on their care.⁷

Structure programs to meet participants' needs



SWFI grantees face challenges retaining participants when there are long gaps before training starts. Potential strategies to address this include the following:

- **Provide short-term, intensive training.** SWFI grantees may be able to offer short-term training before other training courses begin, depending on their grant agreements. Participants can gain confidence and motivation by quickly receiving credentials, micro-credentials, certificates, or badges. For example, the Alachua Bradford Regional Workforce Board dba Career Source SWFI grantee offers ongoing weeklong Microsoft courses so participants can enroll in initial IT training immediately.
- **Identify on-the-job training opportunities, externship or internship opportunities, or other short-term activities that participants can engage in before they start training.** Particularly if SWFI grantees are serving TANF participants, grantees may want to find activities that can help

³ <http://catalog.edcc.edu/content.php?catoid=3&navoid=2701>

⁴ <https://library.fatherhood.gov/cwig/ws/library/docs/fatherhd/Blob/64326.pdf?w=NATIVE%28%27TI+ph+is+%27%27Tips+f+or+Retaining+Participants+in+Fatherhood+Programs%27%27+AND+AUTHORS+ph+like+%27%27National+Responsible+Fa+therhood+Clearinghouse%27%27%27%29&upp=0&rpp=-10&order=native%28%27year%2FDescend%27%29&r=1&m=1>

⁵ https://www.acf.hhs.gov/sites/default/files/ofa/hpog_tanf_paper_final_508.pdf

⁶ Quigley, B. A. (1998). The first three weeks: A critical time for motivation, Focus on Basics, 2(A).

⁷ Dhar, Vikrom K. et al. (2018). Benefit of social media on patient engagement and satisfaction: Results of a 9-month, qualitative pilot study using Facebook. Surgery, Volume 163, Issue 3, 565 – 570.



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participants meet work requirements while they wait to begin training. In addition, work groups on resume writing and interviewing techniques can help participants improve their skills and stay engaged before job training begins.

Use behavioral interventions to keep participants engaged



Behavioral science studies show how people make decisions. It recognizes that people often act with imperfect information or fail to act altogether, even when there are benefits to action. Behavioral interventions test whether aligning programs to these human tendencies can improve outcomes.⁸ Potential behavioral strategies to enhance SWFI

engagement include:

- **Understand participant drop-off.** To implement behavioral interventions, grantees need to understand when and why participants drop out of programs. Closely tracking when in the process participants leave programs, and contacting participants to find out why they left the program, can provide grantees with useful information for developing strategies to minimize participant drop off.
- **Use carefully designed emails or text message reminders.** Emails or texts have been used to increase participation in other employment and training programs. To continue receiving Unemployment Insurance benefits, claimants must attend a series of three one-on-one Reemployment and Eligibility Assessment (REA) sessions. However, 43 percent of claimants did not schedule their first appointment before the deadline, and 19 percent did not attend their first scheduled session. After instituting a series of email reminders, there was a 14 percentage-point increase in claimants who completed the REA program. These emails had the following features:⁹
 - A personal and collaborative tone to foster a positive relationship with claimants, capture their attention, and emphasize the benefits of the program.
 - Concise instructions to convey the ease of scheduling a session and to encourage claimants to act right away.
 - Reminder emails to reduce the potential for inattention, procrastination, and forgetfulness.
 - Planning prompts that encourage participants to make plans to reduce procrastination.
- **Closely track the effects of behavioral interventions.** It is important to determine whether behavioral interventions are changing participant behavior as intended or whether additional changes are needed. In another program, a grantee closely tracked the effect of targeted text messages. Initially, these text messages had a negative effect on participant behavior, so the messages were revised. Continued tracking and revision helped the grantee ensure the text messages were effective.

⁸ Darling, Matthew, Christopher O'Leary, Irma Perez-Johnson, Jaclyn Lefkowitz, Ken Kline, Ben Damerow, Randall Eberts, Samia Amin, and Greg Chojnacki. "Using Behavioral Insights to Improve Take-Up of a Reemployment Program: Trial Design and Findings." Washington, DC: Mathematica Policy Research, May 2017.

⁹ <https://www.dol.gov/asp/evaluation/completed-studies/BI-Files/8-BILRP-Implementation-Brief-Final-20170501.pdf>

Video: <https://www.mathematica-mpr.com/our-publications-and-findings/publications/simple-encouragement-emails-increased-take-up-of-reemployment-program-infographic>