Evaluation of
Employment Coaching for TANF and Related Populations

LIFT:
Implementation Findings from the Evaluation of Employment Coaching

OPRE Report #2021-223 • October 2021

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Contract/Task Number: HHSP233201500035I / HHSP23337018T

Mathematica Reference Number: 50327

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Acknowledgements

The efforts of many individuals have been indispensable in the implementation evaluation of LIFT. The authors would like to thank the central office staff, Sophie Sahaf and Brian Marroquin, for their assistance in launching the evaluation. Brian Marroquin also provided background on the program and helpful comments on the draft report. We would like to thank the program staff from Chicago, Los Angeles, and New York City who were instrumental in helping us plan and conduct the site visits and interviews.

We also owe a deep debt of gratitude to the hundreds of adults who volunteered to participate in the evaluation and shared their experiences with us in surveys and in-depth interviews.

We are deeply appreciative of the financial support and technical guidance from the U.S. Department of Health and Human Services Administration for Children and Families (ACF). Hilary Bruck, Victoria Kabak, Gabrielle Newell, and Sarita Barton provided support and advice through our work on the implementation evaluation and provided helpful comments on multiple drafts of this profile.

A large project team contributed to this evaluation. Before his well-earned retirement from Abt Associates, Alan Werner guided the design of the implementation study and provided input into the data analysis. Correne Saunders reviewed draft outlines and reports and provided helpful guidance. Other Abt Associates contributors include Rachel Cook and Deena Schwartz, who conducted site visits, and Cara Sierks, who analyzed staff survey data. From Mathematica, Jennifer Herard-Tsiagbey and Hannah McInerney conducted site visits, Miranda Kharsa and Jennifer Herard-Tsiagbey conducted in-depth participant interviews, Clare Wolfendale and Kerry Schellenberger carefully analyzed the administrative data, and the Mathematica Graphic Design Group produced the report.

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Overview

This report summarizes the design and implementation of LIFT, a coaching intervention in four cities that aims to help participants identify and attain goals related to self-sufficiency. Over two years, volunteer coaches, who are unpaid Masters of Social Work student interns, work with participants on short- and long-term goals specific to finances, education, and/or employment. The program also provides financial incentives to encourage ongoing participation in coaching sessions, and workshops and social events to build participants' skills and social networks. To be eligible for the program, potential participants must be a parent or caregiver of a child under age 8 and demonstrate a level of stability necessary to work on long- and short-term goals. LIFT is one of four coaching interventions included in the ***Evaluation of Employment Coaching for TANF and Related Populations***. Sponsored by the Administration for Children and Families (ACF), the evaluation aims to learn more about the potential of different coaching approaches in helping low-income adults become more economically secure. The evaluation includes an implementation study and an impact study.

A future report will describe the effect of LIFT on participants' self-regulation skills, employment, earnings, receipt of public assistance, and other measures of personal and family well-being.

RESEARCH QUESTIONS

The report answers the following research question:

- **How was LIFT implemented?**

  —What is the design?

  —What factors appear to imped or facilitate implementation of LIFT as designed?

  —What were participants' experiences with coaching and what services did they receive?

PURPOSE

This report describes LIFT's design and goals, the target population and program participants, the implementation of coaching, and other services available to program participants. The findings are of interest to practitioners and policymakers considering implementing or supporting coaching interventions and will provide important context for understanding and interpreting the findings from the impact study. The findings will also support future replication of employment coaching interventions.

HIGHLIGHTS

Overall, LIFT was implemented as designed. Key findings from the implementation study are:

- Coaching began immediately with intake staff who assessed the participants' priorities and satisfaction with different areas of their lives. Thus, all participants received at least one coaching session. The assigned coach met with the participant shortly thereafter to begin the coaching relationship.

- Most coaching sessions followed a standard format focused on goals and action steps, but coaches deviated from that format if participants had immediate needs.
- Coaches were typically unpaid graduate student interns, a cost-effective approach but with implications for continuity of the coaching relationship.
- Coaches generally succeeded in providing collaborative and nondirective coaching and developed trusting relationships with participants.
- On average, participants had 6.5 coaching sessions over the first nine months; by month nine, more than half of participants remained in contact with LIFT.
- LIFT offered incentives for participating in coaching sessions, but about 40 percent of participants did not receive one.
- Non-coaching services aimed to strengthen participants' skills and peer networks.

METHODS

The report is based on the following data sources:

- In-person interviews with LIFT staff and coaching observations (spring 2019);
- A staff survey (winter 2019);
- Participant demographic, economic, and educational information collected in a baseline survey when participants enrolled in the study (between June 2018 and November 2019);
- In-depth, in-person interviews with nine LIFT participants (spring 2019);
- Video recordings of 15 coaching sessions (between April and June 2019);
- Service receipt data from LIFT's management information system (from June 2018 through November 2020); and
- Discussions with LIFT staff as part of technical assistance in implementing the evaluation (ongoing).

Executive Summary

Policymakers, program operators, and other stakeholders are interested in the potential of employment coaching interventions to help Temporary Assistance for Needy Families (TANF) recipients and participants of other programs designed for low-income populations to attain economic self-sufficiency. Coaching—in which trained staff members work with participants to set individualized goals and provide support and feedback as participants work toward their goals—has been shown to be an effective method for changing behaviors and improving self-regulation skills needed to find and maintain work for corporate managers and teachers, and has been applied in multiple settings. To explore the potential of employment coaching for low-income populations, the Office of Planning, Research, and Evaluation (OPRE) within the Administration for Children and Families (ACF), U.S. Department of Health and Human Services, is sponsoring the ***Evaluation of Employment Coaching for TANF and Related Populations***. The evaluation assesses the implementation of four coaching interventions and their impacts on the self-regulation skills, employment, earnings, self-sufficiency of study participants. This report describes the design and implementation of one of the interventions—**LIFT**—which has offices in four cities: Chicago, Los Angeles, New York City (which are participating in the study) and Washington, DC.

The LIFT Program Model. LIFT uses a coaching approach to help participants, known as "members", create a plan to attain short- and long-term goals related to three pillars of self-sufficiency: financial security, educational attainment, and career advancement. Coaches are unpaid student interns from Masters in Social Work (MSW) programs at local universities. Participants receive financial incentives of up to $150 every three months if they attend sessions regularly. Other services, such as workshops and social gatherings, aim to strengthen participant skills and networks.

Participants. To be eligible for LIFT, applicants must be parents or other caregivers of children under age 8, or expectant parents. This criterion was informed by literature that indicates programs have the most effect on children's future earnings if parents increase their earnings when children are young (Duncan & Magnuson, 2011). Additionally, applicants must demonstrate a level of stability needed to work on long- and short-term goals; that is, they must have stable housing for at least six months, and be employed or have someone in the household who is employed at least part-time or be in an educational program. Almost all LIFT study participants are female; on average, they are in their early 30s and have two children. LIFT study participants are economically disadvantaged. Although more than half worked in the 30 days prior to study entry, the average earnings per worker during that period was $1,197, or about $14,300 per year. Almost 40 percent of participants lack a high school diploma or a General Educational Development (GED) certificate, and 22 percent have a high school diploma or GED certificate only (with no additional post-secondary education credentials).

A LIFT coach meets with a participant.

(Photo: Rich Clement, Mathematica)

LIFT in Practice. Overall, LIFT was implemented as designed. Key findings from the implementation study are:

- **Coaching began immediately with intake staff who assessed the participants' priorities and satisfaction with different areas of their lives; the assigned coaches met with the participants shortly thereafter.** Most participants had two coaching sessions during their first month in the program. The first session occurred during the intake meeting and was conducted by the intake worker; thus, all program participants received at least one coaching session. During this session, participants identified a "goal intention"—an initial thought about a goal—and recorded it on a Goal Plan form. The assigned coach aimed to schedule the second session within two weeks. At this meeting, the coach and participant reviewed the Goal Plan and began discussing specific goal(s) and steps to reach them.
- **Most coaching sessions followed a standard format focused on goals, but coaches deviated from that format if participants had immediate needs.** After the initial month, coaches scheduled one-hour sessions a minimum of once per month. Sessions typically began with the coach summarizing what action steps the participant planned to take following the last meeting. The coach and participant then discussed progress toward those steps, celebrated successes, and discussed any challenges to completing steps, including any resource needs. The coach then worked with the participant to revise goals if needed, and discussed next steps, including scheduling the next meeting, and specific activities the participant will complete prior to the next meeting. However, LIFT instructs coaches to be flexible. Coaches did not focus on goal setting if the participant was not ready to do so because of other more pressing concerns. Overall, in the first nine months after study enrollment, 61 percent of all sessions included a discussion of goals per LIFT's management information system.

- **Coaches are typically unpaid graduate student interns who work one academic year, a cost-effective approach but with implications for continuity of the coaching relationship.** The benefits of using unpaid coaches included reduced cost of the program overall. Staff reported that MSW students are highly educated and have basic skills in empathy and active listening, both important components of coaching. Additionally, coach turnover is predictable; because staff know when MSW students' placements end, their turnover can be more easily managed. LIFT staff also described drawbacks associated with using interns as coaches. Because interns work at LIFT for one academic year and participants attend for up to two years, participants who stay in the program for the full two years must build a relationship with a new coach at least once during their tenure in the program. Data from the LIFT management information system shows that during their first nine months in the program, participants had, on average, two coaches (excluding the intake worker who conducts the first coaching session). Also, due to their class schedules, coaches did not work full-time. They worked, on average, 16 hours per week, which made scheduling sessions at mutually available times difficult for some coaches and participants.
- **LIFT coaches generally succeeded in providing collaborative and nondirective coaching and developed trusting relationships with participants.** Coaches aimed to strike a balance between being a trusted support in the participant's life and ensuring that sessions were participant-led. One coach noted that her favorite aspect of LIFT is that participants, not the coaches, are the experts and that coaches use active listening techniques and ask permission to provide input to facilitate goal development and action steps. Analysis of a sample of recorded coaching sessions indicated coaches were generally nondirective.
- **On average, participants had 6.5 coaching sessions over the first nine months; by month nine, more than half of participants remained in contact with the program.** Data from LIFT's management information system indicates that the average participant met two to three times with a coach in the first month, inclusive of the intake session. Participants averaged 3.4 sessions in the first three months, 5.1 sessions in the first six months, and 6.5 sessions in the first nine months. Thus, after attending approximately one session per month for the first three months, participation declined to less than once per month, on average.
- **Sixty percent of participants received an incentive payment in the first nine months after enrollment.** Participants received incentives if they attended at least two coaching sessions in a three-month period. On average, participants received one incentive payment during their first nine months in the program.
- **Other services aimed to strengthen participants' skills and peer networks.** LIFT organized workshops and social events for participants. Staff noted that social networks are important for promoting long-term change. Examples of events included two-generational workshops, where participants learned about banking and savings while their children decorated piggy banks to take home and start their own savings; financial and credit counseling workshops; and holiday parties.

What is Next. A future report will present information on the impact of LIFT on participants' self-regulation skills, employment, earnings, receipt of public assistance, and other measures of personal and family well-being.

I. Introduction

Poverty and other chronic stresses can hinder the development and full use of the "self-regulation" skills that are needed to find and maintain employment (Mullainathan & Shafir, 2013; Cavadel, et al., 2017). Self-regulation skills—sometimes referred to as soft skills or executive functioning skills—are the skills needed to finish tasks, stay organized, and control emotions (Nyhus & Pons 2005; Hogan & Holland 2003; Störmer & Fahr 2013; Caliendo, et al., 2015). Examples of self-regulation skills relevant to employment include, among others: grit and self-efficacy needed to continue at a task despite setbacks, time management necessary to show up to work on time, and emotional understanding and regulation needed when dealing with difficult coworkers or supervisors.

Box 1. About the Evaluation of Employment Coaching for TANF and Related Populations

The evaluation is assessing the implementation of four coaching interventions and, using an experimental research design, their impacts on participants' self-regulation, employment, earnings, self-sufficiency, and other measures of well-being. The coaching interventions are:

- **Family Development and Self-Sufficiency program (FaDSS)** in Iowa. Under contract to the state, 17 local human services agencies use grants from the Iowa Department of Human Rights to provide TANF recipients with coaching during home visits. Seven of those 17 agencies are participating in the evaluation. Coaches address families' challenges to employment and job retention.
- **Goal4 It!**™ in Jefferson County, Colorado. Goal4 It!™ is an employment coaching intervention designed by Mathematica and partners that is being piloted in a TANF program as an alternative to more traditional case management.
- **LIFT** in Chicago, Los Angeles, and New York City. LIFT is a non-profit organization that provides career and financial coaching to parents and caregivers of young children. LIFT also operates in Washington, D.C., but that location is not participating in the evaluation due to its size and involvement in another evaluation.
- **MyGoals for Employment Success** in Baltimore and Houston. MyGoals is a coaching demonstration project designed by MDRC and partners that provides employment coaching and financial incentives to unemployed adults receiving housing assistance. It is operated by the Housing Authority of Baltimore City and the Houston Housing Authority, respectively.

For additional information about the evaluation and snapshots of each program, visit: https://www.acf.hhs.gov/opre/research/project/evaluation-of-coaching-focused-interventions-for-hard-to-employ-tanf-clients-and-other-low-income-populations.

Research finds that goal setting and developing action steps to meet goals can help develop self-regulation skills (Locke & Latham 1990; Zimmerman, et al., 1992). Coaching—in which trained staff members work with participants to set individualized goals and provide support and feedback as participants work toward their goals—has been shown to be an effective method for changing the behavior and improving the self-regulation skills of corporate managers and teachers (Jones et al., 2015; Fletcher & Mullen, 2012). Coaching has been applied in a number of different settings, including financial management (Collins & Murrell, 2010; Theodos, et al., 2015), higher education (Bettinger & Baker, 2011), and health (Pirbaglou, et al., 2018).

Recently, there has been growing interest among a range of stakeholders, including policymakers and employment program operators, in how insights from research on coaching might be used to improve employment and self-sufficiency outcomes for participants in Temporary Assistance for Needy Families (TANF) and other programs designed for low-income populations.

To explore the potential of employment coaching for low-income populations, the Office of Planning, Research, and Evaluation (OPRE) within the Administration for Children and Families (ACF), U.S. Department of Health and Human Services, is sponsoring the ***Evaluation of Employment Coaching for TANF and Related Populations*** (Box 1). The evaluation assesses the implementation of four coaching interventions and their impacts on study participants' self-regulation skills, employment, earnings, self-sufficiency, and other measures of well-being.

This report describes the design and implementation of one intervention: **LIFT.** Operated by a nonprofit organization of the same name, LIFT provides finance, education, and career coaching to help participants achieve self-sufficiency. The program operates in four cities: Chicago, Los Angeles, New York City, and Washington, D.C. The study includes all locations except Washington, D.C., which was excluded due to its size and involvement in another evaluation.

EMPLOYMENT COACHING

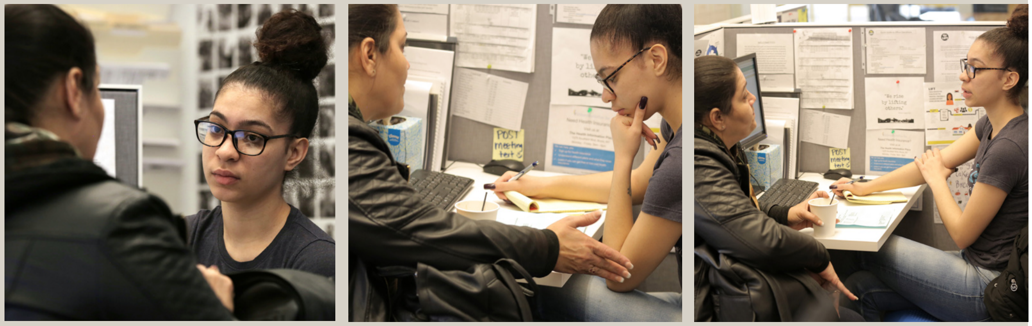
Although there are varying definitions of coaching, this study defines it as an approach that (1) includes goal setting and developing action steps for meeting the goals; (2) is collaborative and not directive; (3) is individualized; (4) helps participants learn the skills to set goals on their own and work toward meeting those goals; (5) attempts to increase participants' motivation to meet goals; and (6) holds the participant accountable for outcomes. Employment coaching, for purposes of this study, is coaching in which goals are related directly or indirectly to employment.

> Employment coaching helps participants practice self-regulation skills needed to find and keep a job.

Employment coaching helps participants practice self-regulation skills needed to find, keep, and advance in a job, and use them after leaving the program. It is distinct from case management, the traditional method for helping TANF and other program participants find and maintain employment, in that it is not directive but rather involves a collaborative relationship between coach and participant. That is, the coach works in partnership with participants to help them set goals, determine action steps, and assess their progress toward those goals, rather than directing participants as to which goals they should pursue and how they will attain them (Joyce and McConnell, 2019).

Despite the interest in employment coaching interventions for low-income adults, there are few rigorous tests of their effectiveness (Martinson et al., 2020). This evaluation builds that research base by testing various employment coaching interventions specifically for low-income populations.

A LIFT coach and a participant engage in a coaching session.



(Photo: Rich Clement, Mathematica)

DATA SOURCES

The primary data sources for this report are:

- In-person interviews with LIFT staff and coaching observations during visits to the three offices included in the study (spring 2019);
- A staff survey of 35 coaches and supervisors (winter 2019);
- Participant demographic, economic, and educational information collected from a baseline survey completed when participants enrolled in the study (between June 2018 and November 2019);
- In-depth, in-person interviews with four LIFT participants in Chicago and five LIFT participants in New York City (spring 2019);
- Video recordings of 10 coaching sessions in Chicago and five sessions in New York City (between April and June 2019);
- Service receipt data from LIFT's management information system (from June 2018 through November 2020); and
- Ongoing discussions with LIFT staff as part of technical assistance in implementing the evaluation.

ORGANIZATION OF THIS REPORT

Section 2 of this report explains the LIFT program model and the context in which it operates. Section 3 summarizes LIFT participant characteristics. Section 4 describes the LIFT model as implemented. The report concludes with a discussion of the main takeaways in Section 5.

Appendix A describes the design of the evaluation, including more details on the evaluation of LIFT. Appendix B includes detailed tables describing participants' characteristics, coaches' characteristics, and participant engagement in the program.

II. The LIFT Program Model

LIFT aims to help participants, known as "members," find a path to financial security by matching them with coaches. Participants identify one or more long-term goals and shorter-term interim goals; coaches work with them for up to two years to build an action plan to achieve those goals. The program focuses on goals in three areas—financial, career, and education.

To be eligible for LIFT, applicants must be parents or other caregivers of children under age 8, or expectant parents. This criterion was informed by literature that indicates programs have the most effect on children's future earnings if parents increase their earnings when children are young (Duncan & Magnuson, 2011).

To be eligible for LIFT, applicants must be parents or other caregivers of children under age 8, or expectant parents.

LIFT applicants must also demonstrate a level of stability that the organization believes is critical to being able to work on long- and short-term goals. Specifically, they must have stable housing for at least six months, and be employed, or have someone in the household who is employed, at least part-time or be in an educational program. Finally, participants must be available to meet regularly for coaching sessions and take steps to achieve goals.

ORIGIN OF LIFT

Founded in 1998 to provide case management to people with low incomes, LIFT began planning a participant-driven coaching intervention in 2015. The Chicago and Washington, D.C. locations led the redesign effort, which was based on research into coaching models and community discussions with parents that focused on the types of supports they needed to attain self-sufficiency. For example, through six focus groups, staff in Chicago learned that parents wanted to provide their children with the best opportunities possible and felt they could not in their current circumstances. Parents also reported they felt socially isolated and not connected to their community. Staff determined that parents were interested in many facets of well-being—economic, as well as health and social.

Based on the research and community discussions, staff explored coaching models that helped participants focus on multiple facets of their lives related to self-sufficiency (education, careers, and finances) through repeated practice of goal setting and attainment and positive reinforcement. Specifically, staff reviewed the Economic Mobility Pathways (EMPath) approach[1] and The Prosperity Agenda Career & Life Coaching Toolkit.[2] The coaching intervention was then designed to foster development of a mutually trusting relationship between coach and participant. Through a two-year engagement, coaches would work with participants with the objective of setting and achieving goals related to self-sufficiency, and ultimately breaking the cycle of poverty for their families.

[1] Information about the EMPath approach is available at: https://www.empathways.org/approach.

[2] Information about the toolkit is available at: https://theprosperityagenda.org.

KEY ELEMENTS OF LIFT

As designed, LIFT comprises the following key elements:

- **Goal setting in three areas related to self-sufficiency:** Participants identify one or more long-term goals and shorter-term interim goals (milestones) that are intended to lead to long-term financial security. Goals can be financial (e.g., increasing savings and reducing debt), educational (e.g., participating in high-quality educational opportunities), career oriented (e.g., securing jobs that can provide economic stability), or some combination of the three.
- **Coaching by unpaid student interns:** Most coaches are Masters in Social Work (MSW) students fulfilling degree-related field placement requirements. They work part time and their placements last approximately one academic year.
- **Coaches trained on the role of self-regulation skills:** Coaches are trained on the role of self-regulation skills in goal pursuit, but do not discuss self-regulation skills explicitly with participants.
- **Emphasis on beginning coaching immediately after enrollment:** Coaching begins at the intake session. An intake worker discusses with the participant his or her satisfaction with and priorities for different areas of his or her life. During the study intake period, this intake session was conducted either by a program coordinator or a program fellow hired to help with study intake. A coach is assigned shortly thereafter and aims to meet with the new participant within two weeks of intake.
- **Monthly hour-long sessions for two years:** Following the first month in the program, in which the participant attends two meetings (one with the intake worker and one with a coach), coaches and participants aim to meet monthly for up to two years, either in person or via phone. Depending on the location, in-person meetings occur at the program office or a community partner office (as described in Box 3, in-person meetings were suspended during the pandemic).
- **Financial incentives:** LIFT provides financial incentives to encourage ongoing participation in coaching sessions and address participants' financial needs. Financial incentives are awarded at quarterly reviews of progress toward goals, known as goal cycles. Participants receive $150 at the end of each goal cycle, every three months, if they attend at least two sessions during that quarter. Total payments over the two years cannot exceed $1,000. According to national office staff, program designers wanted to ensure that the incentive amount would not be so high that it could negatively affect a participant's eligibility for benefits (e.g., TANF or Supplemental Nutrition Assistance Program [SNAP] benefits) but would be substantial enough to provide relief to participants so they would have money available for unexpected expenses.
- **Other services to strengthen participant skills and networks:** Each location can provide workshops on a variety of topics (e.g., health and wellness, credit) and social events (e.g., holiday parties).

PROGRAM CONTEXT

Although applicants can come from any part of the city, the LIFT offices operate in low-income neighborhoods in their respective cities: the Bronzeville area of the South Side (Chicago), Pico-Union (Los Angeles), and South Bronx (New York City).

All three neighborhoods are economically disadvantaged (Box 2). Income is low; the median annual household income is highest in Bronzeville but still only about $38,500. In 2019, citywide unemployment rates were higher than the national average (4.5 percent) in all three locations. The neighborhoods differ in their racial/ethnic composition. Bronzeville is predominantly Black (87 percent). Pico-Union is predominantly Hispanic (82 percent). South Bronx is more diverse, with 57 percent of residents identifying as Hispanic and 40 percent as Black.

Box 2. LIFT Neighborhoods

Chicago: Bronzeville

- 87% Black, non-Hispanic; 6% White, non-Hispanic
- Median annual household income = $38,500
- 2019 unemployment rate (Chicago): 6.3%

Los Angeles: Pico-Union

- 82% Hispanic (excluding Black and Asian Hispanics); 9% Asian
- Median annual household income = $25,600
- 2019 unemployment rate (Los Angeles): 5.0%

New York City: South Bronx

- 57% Hispanic (excluding Black and Asian), 40% Black
- Median annual household income = $27,100
- 2019 unemployment rate (New York City): 5.2%

Source for demographics and income: https://statisticalatlas.com; updated 9/2018

Source for 2019 one-year unemployment rate estimates: American Community Survey https://api.census.gov/data/2019/acs/acs1/subject

While other coaching services exist in all three cities, they are components of larger programs and focused largely on financial counseling (e.g., New York City's Financial Empowerment Centers and Imagine LA and Koreatown Youth and Community Center in Pico-Union).

Other community resources that aim to help families become self-sufficient include American Job Centers, which provide employment services and, for eligible customers, funding for training; community colleges; and community-based organizations providing support services.

Implementation study data collection occurred prior to the onset of the 2019 novel coronavirus disease (COVID-19) pandemic. As a result of COVID-19, LIFT made significant changes to how it was operated (Box 3).

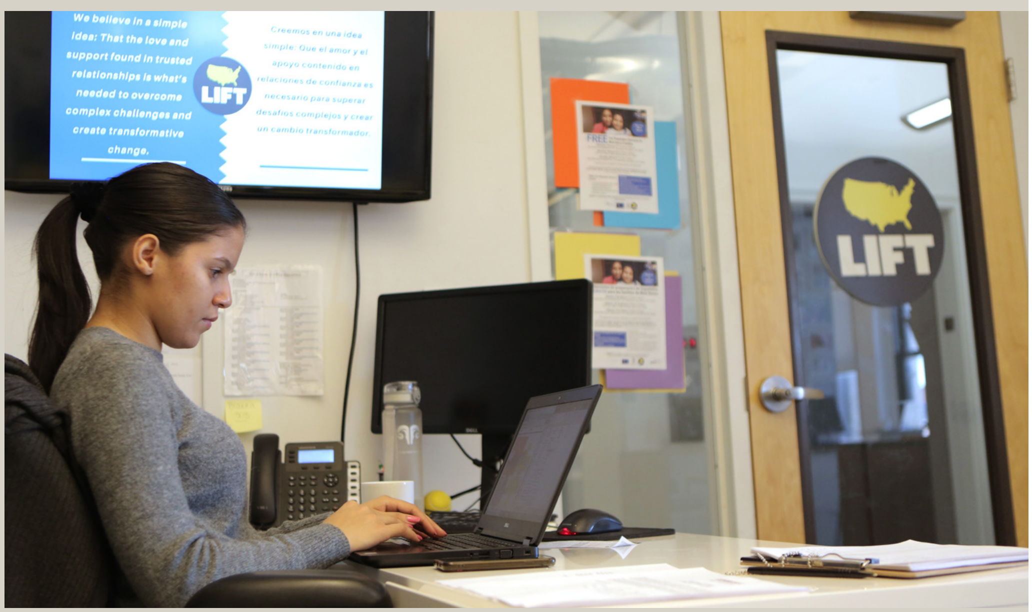
Box 3. LIFT Implementation during COVID-19

In January 2020, before the COVID-19 pandemic, LIFT began pilot testing a virtual coaching format as an option for participants with the intention of assessing the pilot findings in summer 2020. On March 17, 2020, due to the onset of the COVID-19 pandemic, LIFT ended the pilot and moved all coaching sessions and in-person services to the virtual format. Around the same time, universities began reducing the number of hours required of MSW student interns to fulfill their field placement obligations. This change left LIFT with less availability from coaches, although the program was still serving the same number of participants. LIFT filled some of the staffing shortages by having full-time staff such as program managers and coordinators provide coaching to more participants. LIFT also trained and on-boarded new MSW student coaches in summer and fall 2020. As of January 2021, MSW interns continued to work reduced hours, all staff continued to work remotely, and all coaching sessions were virtual.

In addition to the shift to virtual coaching sessions, LIFT implemented four other pandemic-related changes. First, LIFT suspended the requirement that applicants must be employed or in an educational program. LIFT made this change because of the increase in sudden job losses and COVID-19-related unemployment. (As of the report publication date, LIFT management had not reinstated the requirement.) Second, the program paused plans to graduate participants after two years, allowing participants who had already received services for two years to continue receiving services due to ongoing need during the crisis. Third, the program changed the focus of goal setting. While economic mobility remained the focus of LIFT, the pandemic caused a shift in the program to focus explicitly on near-term stability. To meet participants "where they are at," the program quickly implemented a change from helping participants set long-term mobility-focused goals to setting short-term goals focused on obtaining immediate employment to meet basic needs and accessing public benefits. All three of these changes remained in effect as of January 2021. Finally, from April through August 2020, LIFT also provided all participants emergency COVID-19 cash relief, in addition to the regular incentive payments for completion of a goal cycle, ranging from $1,400 to $2,000 per participant.

Source: Phone interviews with LIFT program staff completed in fall 2020.

A LIFT staff member works at the front desk.



(Photo: Rich Clement, Mathematica)

III. LIFT Participants

LIFT offices use a variety of channels to identify potential participants. In Chicago, LIFT is "embedded" in early childcare centers; not only are they the primary referral source for LIFT, but coaches also use space in the centers to conduct sessions. The New York City office created partnerships with local community leaders, such as faith leaders and community organizers, as well as schools, to help identify members of the community who would be a good fit for LIFT. Most referrals come from partnerships with local schools and a local settlement house. The Los Angeles office created partnerships with community colleges, childcare centers (including Head Start centers), local elementary and charter schools, housing organizations, and other nonprofits. Los Angeles staff also work with the nonprofit Children's Bureau (which is in the same building). All offices also leverage and are trying to increase referrals from current and former LIFT participants. Los Angeles staff, for instance, reported that participant referrals account for over 40 percent of their new enrollees.

Across locations, almost all study participants are female (95 percent). On average they are in their early 30s, with two children (Exhibit 1). (Appendix Table B.1 includes more participant characteristic details.)

Participants' race and ethnicity vary, reflecting the different neighborhoods in which LIFT operates. Across all cities, 28 percent of LIFT study participants are Black, non-Hispanic. There is considerable variation by office: the proportion of participants who are Black ranges from 6 percent in Los Angeles to 85 percent in Chicago. Seventy percent of all LIFT participants are Hispanic; the proportion ranges from 10 percent in Chicago to 94 percent in Los Angeles.

Average earnings of LIFT participants were about $14,300 per year prior to study entry.

LIFT study participants are economically disadvantaged. Although the majority worked in the 30 days prior to study entry (53 percent), average earnings per worker during that period was $1,197, or about $14,300 per year, well below the neighborhood medians (Box 2). Most participants received public assistance benefits at the time of study entry, although a greater proportion of Los Angeles and New York City participants did so (87 percent) than did Chicago participants (78 percent).

LIFT participants generally had limited education at the time they entered the study. More than one-third (38 percent) did not have a high school diploma or a General Educational Development (GED) certificate; for 22 percent, a high school diploma or GED certificate was their highest level of education. Chicago participants were outliers in this regard. Only 4 percent lacked a diploma or GED certificate, and 38 percent had an Associate or bachelor's degree; by way of comparison, a much smaller share of New York City and Los Angeles participants had one of these credentials (13 percent and 10 percent, respectively).

Thus, Chicago study participants, on average, were less disadvantaged than those in Los Angeles and New York City. They had higher education levels at the time of study entry, a larger proportion had recent work experience, and those who worked had greater earnings.

Exhibit 1. Baseline Characteristics for LIFT Program Group, by Location

Baseline characteristic	LIFT Overall	Chicago	Los Angeles	New York City
Demographics				
Average age (in years)	33.2	32.6	33.4	33.4
Female (percentage)	94.6	94.7	94.6	94.4
Race and ethnicity (percentage)				
Hispanic	70.3	9.7	93.6	76.4
Black, non-Hispanic	27.7	84.9	5.5	22.5
White, non-Hispanic	0.7	3.2	0.0	0.0
Other	1.2	2.2	0.9	1.1
Number of children with whom respondent lives (#)	2.3	2.0	2.2	2.5
Socioeconomic status				
Education level (percentage)				
Did not complete high school or GED	38.3	4.3	56.8	28.1
High school diploma	21.7	18.1	17.6	36.0
GED certificate	2.7	2.1	2.7	3.4
Some college but no degree	18.5	30.9	13.1	19.1
2-year or 3-year college degree (Associate degree)	7.9	14.9	5.4	6.7
4-year college degree (Bachelor's degree)	9.1	23.4	4.1	6.7
Receiving any income from public assistance/social insurance program (percentage)	84.8	77.7	87.2	86.5
Employment status and history				
Worked for pay in past 30 days (percentage)	53.1	90.4	36.9	54.0
Earnings in past 30 days among those who worked ($)	1,197	1,435	1,124	891

Source: Baseline survey for program group participants (*n*=405).

IV. LIFT in Practice

Overall, LIFT offices implemented the program as designed.

Coaching began immediately with intake staff who assessed the participant's priorities and satisfaction with different areas of their lives; the assigned coach met with the participant shortly thereafter.

Box 4. LIFT Implementation Key Takeaways

1. Coaching began immediately with intake staff who assessed the participant's priorities and satisfaction with different areas of their lives; the assigned coach met with the participant shortly thereafter
2. Most coaching sessions followed a standard format focused on goals, but coaches deviated from that format if participants had immediate needs.
3. Coaches are typically unpaid graduate student interns, a cost-effective approach but with implications for continuity of the coaching relationship, and training and supervision needs.
4. LIFT coaches generally succeeded in providing collaborative and nondirective coaching and developed trusting relationships with participants.
5. On average, participants had 6.5 coaching sessions over the first nine months; by month nine, more than half of participants remained in contact with the program.
6. Sixty percent of participants received at least one incentive payment in the first nine months after enrollment; participants had different perspectives on the extent to which the incentives affected program engagement.
7. Other services aimed to strengthen participants' skills and peer networks.

The goal-setting process began during the intake meeting; thus, all program participants received at least one coaching session. Participants completed the Wheel of Life, an assessment designed to help them identify their satisfaction with and values they place on different areas of life (Box 5). Participants then identified a "goal intention"—an initial thought about a goal—and recorded it on a Goal Plan form.

Box 5. The Wheel of Life

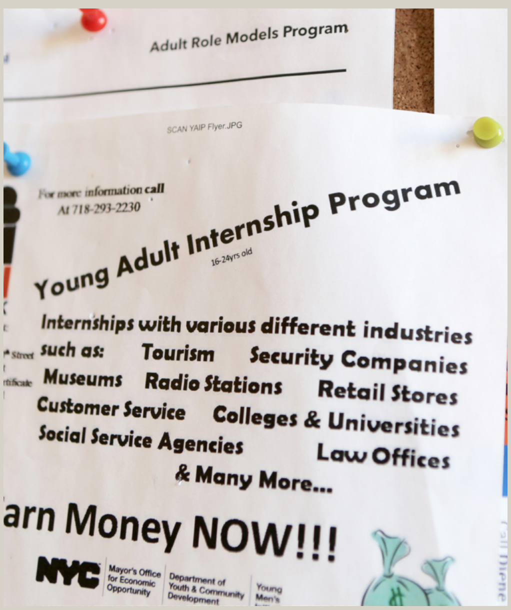
The Wheel of Life assesses participant satisfaction in eight areas: (1) finances; (2) employment and career; (3) education; (4) basic needs such as food, housing, transportation, and safety; (5) child well-being and parenting; (6) health and well-being; (7) family, friends, and relationships; and (8) other (participant can fill in the blank). The participant ranks each on a scale of 1 (very unsatisfied) to 5 (very satisfied).

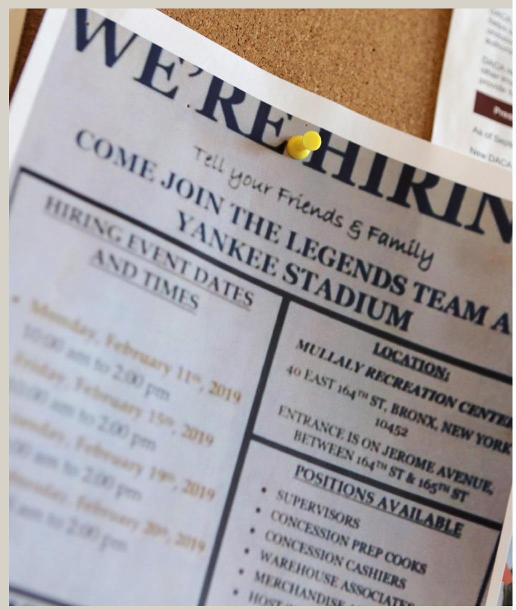
Shortly after this initial meeting, a LIFT supervisor assigned the participant to a coach, who attempted to meet with the participant within two weeks of intake. The Chicago and New York City LIFT offices generally assigned participants to coaches based on the coaches' availability, but also made specific assignments based on needs (e.g., a Spanish speaker will be assigned to a Spanish-speaking coach). The Los Angeles location made an initial assignment, but subsequent coaching sessions were subject to coach availability. For instance, if a participant wanted to schedule a follow-up session on a particular day and the assigned coach was unavailable, the participant could opt to meet with a different coach. Since March 2020, the Los Angeles office has used the same approach as the other offices and assigned a single coach per participant.

Most coaching sessions followed a standard format focused on goals, but coaches deviated from that format if participants had immediate needs.

Coaches scheduled the initial meeting for one hour. During this meeting, the coach and participant began the process of getting to know each other and discussed the participant's goals at a high level. Per one coach: "The first thing is to establish a rapport. We use Motivational Interviewing and open-ended questions. Once we establish rapport, we can ask about goals and strengths. To find out the types of goals they're interested in, we ask simple questions, like What brings you to LIFT? Why LIFT? How could I help you? What do you want to work on today?" The coach and participant reviewed the Wheel of Life and the initial Goal Plan together, and the participant identified a long-term goal, which may be the same as the goal intention developed with the intake staff member. Next, the coach and participant filled out a finance form that collected information about monthly income, debt, savings, credit card late fees, and other topics. This form is reviewed every three months. Coaches and participants use it as a tool to assess the participant's progress on finance-related topics.

A LIFT bulletin board advertises opportunities for participants.





(Photo: Rich Clement, Mathematica)

Coaches scheduled subsequent sessions for one hour. According to data from LIFT's management information system, the average session lasted 58 minutes (Appendix Table B.2).

Sessions observed on site and via video typically began with the coach summarizing what action steps the participant planned to take following the last meeting. The coach then discussed with the participant progress toward those steps, celebrated successes, discussed any challenges to completing steps, and connected the participants with needed resources. Finally, the coach worked with the participant to revise goals if needed, and discussed next action steps, including scheduling the next meeting. Box 6 describes an example of one coaching session.

Box 6: Example of a Coaching Session

Cynthia* and her coach met in a private conference room and sat across a table from each other for their coaching session at a LIFT office. The coach took notes on her laptop while they discussed how Cynthia was doing and checked in on her goals. It was clear that Cynthia had established a relationship with her coach over the course of their sessions. She appeared comfortable with her coach, freely sharing details of a recent break-up as well as her goals and obstacles.

Cynthia's coach reminded her of the goals they set in previous meetings using a list she had saved on her laptop. Cynthia and her coach then spoke about her progress toward reaching her goal of finding a job. Cynthia reported that she completed most of the interview process with one company and was waiting to hear back about a possible start date. In the meantime, Cynthia was planning to continue to apply for other jobs. Her coach asked if she had the resources she needed to write a resume and cover letter. Cynthia had developed a resume on her own, outside of her coaching sessions, but wanted her coach to review it. Her coach said she would take a look and also email her a resume writing packet, highlighting areas of the packet that would be most useful for Cynthia's resume.

Cynthia was also working on a goal to improve her mental health. Throughout the conversation her coach asked her questions to learn more about how she was supporting herself emotionally. Did she have coping mechanisms? What has held her back from contacting a therapist in the past? Is she getting any support at home or from relatives? Cynthia was very engaged in the conversation and explained how she journals and listens to inspirational podcasts as coping mechanisms and was planning to schedule an appointment with a therapist now that she had health insurance again. During the meeting, Cynthia's coach also helped her fill out a form to receive free clothes, books, and toys for her daughter from a local nonprofit.

Near the end of the session, Cynthia and her coach recapped the action steps they agreed on together for Cynthia to work on before their next meeting. These included working on her resume and scheduling an appointment with a therapist. The coach concluded the meeting with some encouraging words and reminded Cynthia that she could call any time if she needed additional support. At the end of the 40-minute meeting, Cynthia and her coach scheduled their next coaching session for three weeks later.

Source: Video recorded coaching session.

*The participant's name has been changed to protect her anonymity.

Although most sessions aimed to focus on setting and working toward goals, LIFT instructed coaches to be flexible. Coaches did not need to focus on long-term goal setting if the participant was not ready to do so because of other more pressing concerns (Box 7).

Box 7: Coach Demonstrates Flexibility during Session

The coach asked the participant how her day was going; the participant described a number of crises that emerged since the last session. Rather than steer the conversation to goal setting and action steps, the coach gave the participant time to talk through co-occurring issues related to family members and housing. Toward the end of the session the coach and participant discussed potential steps to resolve the crises but did not turn to a discussion of progress toward the participant's long-term goal. Following the session, the coach stated that trying to adhere to the general session format would have been unproductive because the participant was distracted by pressing concerns.

Source: Onsite observation of coaching session.

In the first nine months after study enrollment, most sessions (61 percent) included a discussion of goals per LIFT's management information system (Appendix Table B.3). The proportion of participants who set at least one goal ranged from 96 percent in Chicago to 76 percent in New York City (Exhibit 2). These counts included participants who attended only the intake session (13 percent of participant, see Exhibit 3 below), at which goals were not set; hence the proportion who set a goal was higher among participants with at least one post-intake session with a coach. Across all locations, most goals were related to education (71 percent) or finances (70 percent). About 60 percent of participants set an employment goal. A larger share of Chicago participants set an employment goal (79 percent) relative to the other locations, while Los Angeles and New York City participants most often set a goal related to education (77 percent and 64 percent, respectively). This likely reflects the higher education level of Chicago LIFT participants when they entered the study.

Exhibit 2. Goal Setting in the First Nine Months after Study Enrollment

Goal Setting	LIFT Overall	Chicago	Los Angeles	New York City
Percentage of participants that set a goal	86.9	95.7	87.3	76.4
Type of goal				
Education	70.5	61.7	76.9	64.0
Finances	70.3	79.8	74.2	50.6
Employment	59.9	78.7	56.1	49.4

Source: LIFT's management information system (*n*=404).
Note: Sample size reflects one participant who withdrew from the study.

Box 8 highlights some participants' perspectives on goals.

Box 8: Participant Perspectives on Goals

- "The goal is if I want to save this amount of money in six months that's the long term, but then it's like okay, so, because we meet once a month, so what are you going to do between now and next month to get towards that goal? So that's how we establish, so it's like mini goals and then the big goal."
- "They're helping me make plans. Like for the past year I've been planning. Another thing new to me. I don't plan. I just go with it. So now I'm planning, this is what I'm going to do with my paycheck. I'm already planning. I budgeted my paycheck, and I haven't been to work yet."

Source: In-depth, in-person participant interviews.

Most participants made progress toward their goals as measured by action steps. Almost two-thirds fully or partially completed all identified action steps (64 percent). The proportion was highest in Los Angeles (68 percent) and lowest in Chicago (54 percent) (Appendix Table B.4).

Most LIFT coaches are interns pursuing MSW degrees.

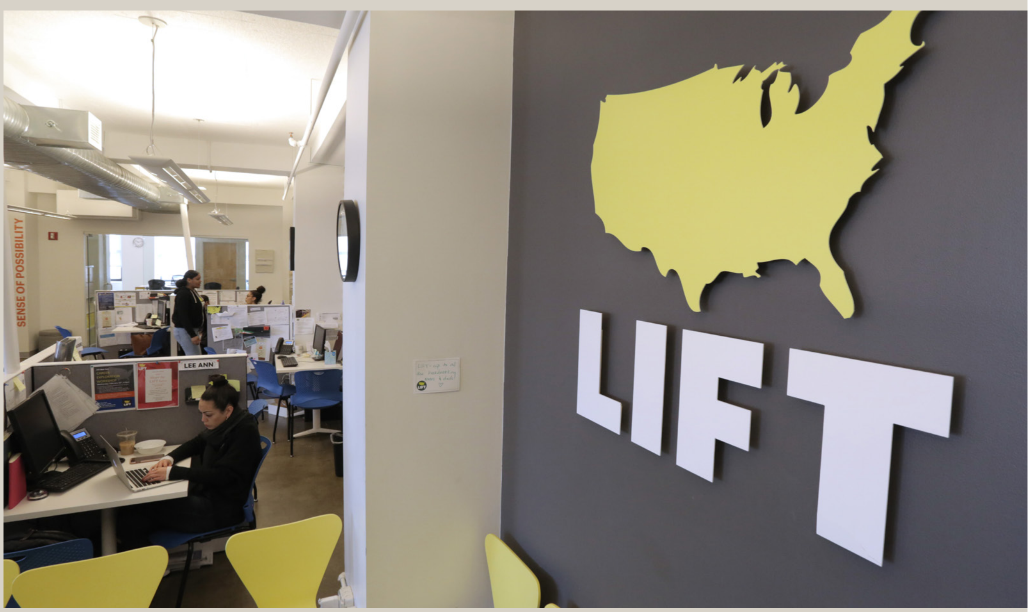
Coaches are typically unpaid graduate student interns, a cost-effective approach but with implications for continuity of the coaching relationship, and training and supervision needs.

Most LIFT coaches are interns who are typically pursuing MSW degrees from local schools, although on occasion LIFT will accept an undergraduate majoring in social work. (Most permanent staff carry small caseloads of at least one participant.) LIFT cultivated partnerships with local schools (e.g., the University of Chicago). Schools generally referred candidates to LIFT for interviews. LIFT staff selected applicants with an interest in the program's goals and target population.

Most coaches remained with LIFT for a nine-month academic year, usually as a practicum placement for their coursework. Because they were students, coaches did not work full-time. According to LIFT national office staff, coaches across locations worked on average 16 hours per week.

LIFT national office staff described the benefits of using interns as coaches. First, because they are unpaid, they reduce the cost of the program overall. Second, they are highly educated (Appendix Table B.5) and, according to LIFT staff, come to LIFT with basic skills in empathy and active listening so the learning curve for coaching is not as large compared to those who do not have a similar background and motivation to serve the public. Third, coach turnover is predictable. National office staff noted that turnover occurs even with "permanent" staff; however, because staff knew when MSW students' placements end, their turnover was more easily managed. LIFT scheduled students to start at different times throughout the year, thus eliminating periods when all coaches were new interns and learning the process. Finally, MSW students generally do not have a background in case management or other occupations that require being directive with clients, so LIFT staff argued it is easier to teach them a model that prioritizes being nondirective.

Coaches work in a LIFT office.



(Photo: Rich Clement, Mathematica)

LIFT staff also described drawbacks associated with using interns as coaches. First, because interns work at LIFT for one academic year and participants attend for up to two years, participants who stay in the program for the full two years must build a relationship with a new coach at least once during their tenure in the program. According to LIFT data, during their first nine months in the program, participants had, on average, two coaches (excluding the intake worker who conducts the first coaching session) (Exhibit 3). The average number of coaches ranged from 1.3 in New York City to 2.6 in Los Angeles. Thirteen percent of Los Angeles participants saw more than four different coaches. This was partly due to the coaches being interns, and partly a function of the office's policy to assign a coach based on availability. Second, because coaches work part time, they have less flexibility for when they can meet with participants.

Exhibit 3. Coach Consistency after Intake

Coaches	LIFT Overall	Chicago	Los Angeles	New York City
Average number of coaches participants were in contact with after intake (#)	2.1	1.7	2.6	1.3
Percentage whose number of coaches after intake was: (%)				
0	13.4	8.6	11.8	22.5
1	26.0	29.0	21.7	32.6
2	26.5	45.2	15.4	34.8
3	17.1	16.1	20.4	10.1
4	9.9	1.1	17.6	0.0
More than 4	7.2	0.0	13.1	0.0
Percentage of all contacts per person after intake that were with the same coach (%)	47.9	59.1	42.5	49.2

Source: LIFT's management information system (*n*=404).
Note: Sample size reflects one participant who withdrew from the study.

LIFT staff acknowledge that transitions between coaches are difficult for participants. The coach-participant relationship is central to the intervention. It often takes participants time to build trust with their coach and feel comfortable enough to share details of their personal lives. To mitigate eventual transitions between coaches, LIFT leadership and coaches emphasize the LIFT-participant relationship in addition to the coach-participant relationship as a way to build trust in the organization as well as with the coach. Activities such as workshops and social events aim to build connection between participants and the program, as well as strengthen participant skills and networks. Supervisors also train coaches to prepare participants for an eventual transition by describing their status as a temporary, volunteer coach during their first session with the participant, and by continuing to remind participants of the eventual transition.

Coaches reported having conversations about their status with participants during their initial meeting and over time but note the transition can still be difficult for participants. In one observed session during the site visit, the coach told the participant it was their last session together, and that the participant would be assigned a new coach. The participant was visibly surprised and upset, and did not recall talking with the coach about an eventual transition. The coach noted after the session she was upfront about her temporary status with the program with the participant.

Because they are graduate students with limited coaching experience, coaches received intensive training and supervision. Coaches attended an initial three-day in-person Lifters in Training session. In preparation, coaches reviewed materials with detailed information about core coaching skills and interventions, which was adapted from The Prosperity Agenda Career & Life Coaching Toolkit.[3] They also watched a video produced by Harvard's Center on the Developing Child that reviewed concepts of self-regulation skills and adult skill building.[4] The in-person training covered a basic understanding of the types of goals that can be achieved in the short term (three months) versus the long term and how to develop action steps with participants to help them make progress toward their goals. Training also focused on nondirective coaching techniques, such as using powerful questions, reflective listening techniques, and asking permission to offer a suggestion. LIFT has no training manual; trainers used a variety of PowerPoints, worksheets, and checklists. Coaches received additional training before they meet one-on-one with participants. Depending on the location, activities included shadowing coaching sessions, completing additional training on how to use the LIFT management information system, completing training for mandated reporting of suspected abuse, and watching additional training videos. Following training, coaches received frequent and intensive supervision from LIFT supervisors (Box 9).

Box 9: Coach Supervision

As part of their MSW programs, all coaches receive faculty supervision focused on their field placements. LIFT supervisors also provide frequent and intensive supervision. LIFT requires supervisors to have an MSW and two or more years of supervisory experience; some supervisors are Licensed Clinical Social Workers. Examples of supervision include:

- Group meetings every other week facilitated by the supervisor to discuss participant-related successes and how to address participant challenges.
- Monthly one-on-one check-ins between coach and supervisor to discuss coach successes, challenges, and "points for input" from the supervisor.
- Monthly group consultations, facilitated by the LIFT office Program Director, which focuses on a specific, challenging participant. A coach presents the case and other coaches provide input. One coach said: "They are helpful; it is nice to get peer input and hear different ideas."
- Daily briefings with coaches (Los Angeles).
- Process recordings, which are written records of interactions with a participant. These are required for MSW programs.*

In addition, supervisors monitor coach performance in the following ways:

- Reviewing management information system reports to ensure that coaches are scheduling and holding coaching sessions and entering data.
- Assessing performance by sitting in on coaching sessions.
- Evaluating coaches for their social work programs.

Source: Onsite staff interviews.

*More information about process recordings is available at https://socialwork.columbia.edu/wp-content/uploads/2015/06/Process_Recordings_Handbook1.pdf.

[3] https://theprosperityagenda.org.

[4] https://developingchild.harvard.edu/resources/video-building-core-capabilities-life/

Coaches reported that they aim to strike a balance between being a trusted support in the participant's life and ensuring that sessions are participant-led.

Finally, because they are students, coaches were slightly younger than participants in most locations and, as noted, more highly educated than participants (Appendix Table B.5).

LIFT coaches generally succeeded in providing collaborative and nondirective coaching and developed trusting relationships with participants.

Coaches reported that they aim to strike a balance between being a trusted support in the participant's life and ensuring that sessions are participant-led. One coach noted that her favorite aspect of LIFT is that participants, and not coaches, are the experts and that coaches use active listening techniques and ask permission to provide input to facilitate goal development and action steps. Another coach reported, "We are there to motivate and inspire, but the participant does all the work." Another stated, "We focus on the empowerment of the participant; giving them the resources, but also letting them take steps independently so that they can replicate those skills in the future. The philosophy includes treating participants with dignity and respect; they are CEOs of their families, so they know what is best for them. Coaches' purpose is to provide support rather than telling them what is best for their families and future."

Analysis of recorded coaching sessions indicated that coaches were generally nondirective in that sample of sessions. In 12 of the 15 sessions observed, coaches did not direct the participant during most of the session. Examples of how they were nondirective include:

- The coach asked the participant how she would like to spend their time together. The participant mentioned that she wanted to work on budgeting. The coach described the different types of budget tools and resources LIFT has to offer and asked the participant to choose which tools would be most useful for her.
- A coach spoke to a participant about setting goals. She said, "Your first goal is to save $2,500 for an emergency fund…You said you started a budget and it's in progress… Do you want to add anything else to your goal?" And the participant replied, "I want to figure out exactly how I can save $2,500 by December. What do I need to make, what do I need to set aside on a monthly basis starting August 1?" The coach then asked, "Do you want me to add that to your goal?"

In three of the 15 sessions, though, coaches were more directive. In one example, when a participant mentioned she had signed up for an online course, the coach shared, "Online classes, they are easier because you can do the online courses as you can and want, but I think it takes more accountability and self-discipline…to make sure you are keeping up with that… So let's touch base on that or we can look for some cool apps that can…help hold you accountable, or maybe we can set a schedule for you to work at the library," without the participant asking for support or expressing concern about online learning.

During in-depth, in-person interviews, participants described how their coaches facilitated goal setting and achievement. When asked who determined what goals a participant will work on, one participant remarked, "[My coach] asked me what I wanted to do, and we put everything into place. The employment, we put it in stages of when and where. She asked me if I had a date when I wanted things to get accomplished… It was all my goals. It was everything I wanted to do."

Coaches and participants spoke of the importance of establishing strong and trusting relationships.

Coaches and participants spoke of the importance of establishing strong and trusting relationships. According to one coach, "The biggest strength is the relationships—building a trusting relationship between coaches and participants." In interviews, participants spoke positively about their relationships with their coaches. Several participants reported that their coaches knew them well, and a few described their relationship as a friendship. Participants used words like nice, pleasant, compassionate, positive, and helpful to describe their coaches. In an in-person, in-depth interview, one participant noted, "Helping me save money for the goals that I set and like I say, having someone that's there and talking me through it and helping me get the resources that I need to keep on doing what I'm doing has been wonderful." Per another, "Like, cuz you can say you're gonna save and you can say you are saving, but if you don't really have a goal or somebody to help you navigate what you're doing, you know, you're not really doing much. So, that's where I see where they come in, where they're helping me." Box 10 describes one LIFT participant's experience in the program.

Box 10: One Participant's LIFT Experience

Jasmine*, a married mother of two with a bachelor's degree, always wanted to start her own business but could not seem to get it off the ground. She came to LIFT expecting to get help starting her small business as well as finding someone to hold her accountable to her goals. In the process, she also developed a strong bond with her coach. Jasmine found her coach to be someone who genuinely cared about her, remembered everything Jasmine told her, and was supportive and motivating while also holding her accountable.

Before joining LIFT, Jasmine found it difficult to achieve her goals, including finding a new job with better health benefits, repairing her credit, and starting her own event venue rental business. It was difficult for her to achieve these goals while caring for her children and other family members. Jasmine faced challenges securing childcare during her work hours, stretching her salary to cover her family's expenses, and finding a job with good health benefits. Caring for family members also caused Jasmine to miss appointments and meetings related to setting up her business. Jasmine worked with her coach to develop concrete action steps such as reviewing resources on developing good credit and doing mock interviews with family and friends. Jasmine's coach sent her text messages and emails between sessions to remind her to attend her small business mentoring program in which she was paired with an experienced entrepreneur. Jasmine's coach also provided her with resources to help her learn how to repair her credit.

Jasmine thought that she would not have completed a business plan if she had not worked with her coach. Her coach helped her along the way by providing encouragement and then proofreading the plan before she brought it to her entrepreneur mentor. With the help of her coach, she developed a plan within six months. Jasmine reported that she intended to use her next LIFT incentive to pay for a business license and looked forward to continuing with LIFT.

Source: In-depth, in-person participant interview.

*The participant's name has been changed to protect her anonymity.

As discussed earlier, however, participants across offices reported that it was difficult to transition to a new coach mid-program. One participant interviewed said, "The coaches [have] a big turnover rate, so don't get too attached like I did. Don't get too attached."

On average, participants had 6.5 coaching sessions over the first nine months; by month nine, more than half of participants remained in contact with the program.

Data from LIFT's management information system indicated that across locations, the average participant met two or three times with a coach in the first month, inclusive of the intake session (Exhibit 4). Chicago had the lowest share of participants who discontinued participation after the intake session (9 percent), and New York City had the highest (23 percent) (Exhibit 3 above).

Exhibit 4: Mean Number of Coaching Sessions per Participant, First Nine Months

Coaching Sessions	LIFT Overall	Chicago	Los Angeles	New York City
In the first month (#)	2.3	2.2	2.4	2.1
In the first 3 months (#)	3.4	3.8	3.5	3.0
In the first 6 months (#)	5.1	5.9	5.1	4.3
In the first 9 months (#)	6.5	7.9	6.4	5.5

Source: LIFT's management information system (*n*=404).
Note: Sample size reflects one participant who withdrew from the study.

As noted above, after the first month, coaches aimed to meet with participants at least once per month. Exhibit 4 shows that participants had an average of 3.4 sessions in the first three months (inclusive of the two meetings in the first month). Participants averaged 5.1 sessions in the first six months, and 6.5 sessions in the first nine months.

Thus, after attending approximately one session per month for the first three months, participation declined to less than once per month, on average. Participants in Chicago had the largest mean number of contacts at every interval, meeting on average eight times in nine months, or almost monthly. New York City participants had the lowest mean number of contacts.

Some participants stopped engaging with LIFT before their two-year limit. All participants had contact with LIFT during the first month in the program because the first coaching session occurred at the intake session. Just over 80 percent of participants participated in a coaching session after the first month (Exhibit 5); this suggests that nearly 20 percent of participants engaged only in the first month

Exhibit 5: Percentage of Participants who had any Coaching Session after the First Month and after the Eighth Month of the First Year, by Location

Coaching Session	LIFT Overall	Chicago	Los Angeles	New York City
After the first month	80.5	91.4	74.6	82.1
After the eighth month	59.0	72.8	53.5	57.7

Source: LIFT's management information system (*n*=404). This includes only coaching that occurred in the first year after study enrollment.
Note: Sample size reflects one participant who withdrew from the study.

after study enrollment and then did not participate in any coaching sessions in the remainder of the year. Others disengaged as time went on. At least 59 percent were still engaged in the program at nine months after study enrollment (Exhibit 5). Engagement was highest in Chicago and lowest in Los Angeles.

Regardless of time in the program, prior to the COVID-19 pandemic, almost all coaching sessions were in person (Exhibit 6). A larger share of contacts between New York City and Los Angeles participants and their coaches were in person (91 and 85 percent, respectively) than in Chicago (76 percent), perhaps reflecting that more Chicago participants worked and thus had less flexibility to travel to an in-person meeting. Contacts not in person generally occurred via telephone. Between sessions, coaches encouraged participants to check in via email or texting if a need arises or they have good news to share (Box 11).

Exhibit 6: Average Number of Coaching Sessions per Participant by Mode, First Nine Months after Study Enrollment

Mode	LIFT Overall	Chicago	Los Angeles	New York City
In person (#)	5.4	6.0	5.4	4.7
By telephone (#)	1.1	1.9	1.0	0.5
Percentage of contacts in person (%)	83	76	85	91

Source: LIFT's management information system (*n*=404).
Note: Sample size reflects one participant who withdrew from the study.

Box 11: Communicating between Sessions

Participants can communicate with their coaches between sessions via emails or text messages if an issue arises, to share news, or to simply update the coach on the status of an activity. Coaches encourage participants to use Avochato, a texting service that enables participants to text coaches without using the coach's personal cell phone numbers.

One participant stated, "It was a good feeling that I could always contact her if I need something… like even though we see each other once a month I feel comfortable contacting her…if I need help with something or if I have questions or something like that." Another participant shared, "I could say that I have an interview Thursday at 11:00 and [my coach] will text me at 10, [saying] good luck, relax, it'll be okay, like they'll be lucky to have you. I was just like oh my God, I wasn't expecting that."

Source: In-depth, in-person participant interviews.

Sessions most often occurred in the program office: 91 percent in New York City, 84 percent in Los Angeles, and 54 percent in Chicago. In Chicago, sessions that did not take place in a LIFT office occurred at a partner early childhood education center. Chicago participants who did not have a child in an affiliated center met their coaches at the central office or a satellite office.

Coaches in Chicago and New York City attempted to hold sessions in private spaces but did not always succeed. Los Angeles coaches often used open spaces, such as their cubicles. Of the 15 video recorded coaching sessions, six occurred in office cubicles that were not private. During an in-person interview, one participant described a desire for a more private space:

> "Sometimes when you're having meetings though, I prefer to be in a more private space when I'm talking about things… So, when I'm there at LIFT, it's like everything is open...ever since I've been going, the coaches are in like…in those like cubicles, so, there's no real privacy to open up more or to say, so I have to be like thinking, you know, not to say what I don't really wanna say, stuff like that."

Sixty percent of participants received at least one incentive payment in the first nine months after enrollment; participants had different perspectives on the extent to which the incentives affected program engagement.

Participants received incentives if they attended at least two coaching sessions in a three-month goal cycle. On average participants received one incentive payment during their first nine months in the program (Exhibit 7). Chicago participants received more payments (1.5), on average, than participants in Los Angeles and New York City. Fifty-nine percent of Chicago participants received two or more incentives, compared to 39 percent and 34 percent of Los Angeles and New York City participants, respectively. Overall, participants received 61 percent of the total value of incentives available to them in the first nine months.

Exhibit 7: Incentives Received in First Nine Months

Incentives	LIFT Overall	Chicago	Los Angeles	New York City
Average number of incentives received (#)	1.1	1.5	1.0	0.9
Percentage of participants receiving (%)				
0 incentives	38.9	22.3	43.0	46.1
1 incentive	18.3	18.1	17.6	20.2
2 incentives	34.9	45.7	32.1	30.3
3 incentives	7.9	13.8	7.2	3.4
Average total value of incentives received (among those who received an incentive) ($)	274	292	272	253
Percentage of the total value of potential incentives received (among those who received an incentive)* (%)	61	65	60	56

Source: LIFT's management information system (*n*=404).
Note: Sample size reflects one participant who withdrew from the study.
* The potential incentive amount available over nine months is $450.

Incentive receipt aligns with participation data. During the first three months in the program, participants attended two or more sessions, on average, and thus would be eligible for an incentive (Exhibit 4 above). In months four through six, participants attended 1.7 sessions on average, and in months seven through nine, 1.4 sessions, and thus would not be eligible for an incentive during either of these three-month blocks.

During in-depth, in-person interviews, participants variously described incentives as a motivator, financially helpful, and secondary to the support they got from the program (Box 12).

Box 12: Participant Perspectives on Incentives

"But they were saying that to help you towards your savings goal we'll give you the $150. I think it is a good incentive, but there are other benefits too of being in the program."

"You know, sometimes in LIFT, they give you extra, get a little money here and there in between, you know, if you work hard for it, then you deserve it, you know, and maybe that'll motivate somebody as well to do something."

"And I can't complain about that, because that's totally free, but I would say even if they spread that out, the way that it's calculated into $50 a month. So, even if they do the $50 a month because it's like now I got to wait until that third month in order for me to register for a class if I didn't have the money and who's to say that class is going to be offered [in] three months ..., but I can't complain because it's free money."

Source: In-depth, in-person participant interviews.

Other services aimed to strengthen participants' skills and peer networks.

LIFT organizes workshops, ongoing programming, and social events for participants. A supervisor noted, "The program works because we also take into consideration that social networks are important. That is key to promoting long-term change." According to LIFT national office staff, between July 2020 and June 2021, the three LIFT offices included in the evaluation held 70 workshops and group events; attendance across all events totaled 778 attendees (for context, LIFT served about 713 families total during this time period). This was a higher number than previous years because LIFT switched to virtual events, which were easier for participants to attend.

Examples of events in prior years include two-generational events, such as My First Piggy Bank, which was implemented by the Chicago office. During the event, participants learned about banking and savings while their children decorated piggy banks to take home and start their own savings. LIFT also implemented finance- and career-related activities. New York City has a credit program with Capital One that provided participants one-on-one financial counseling. Los Angeles implemented lending circles (Box 13).

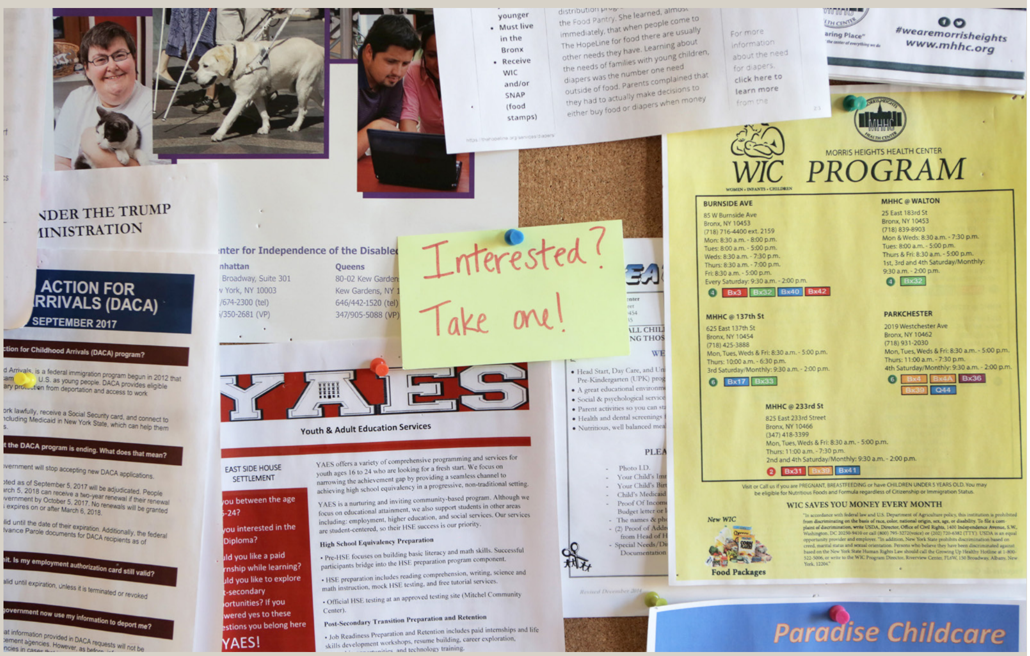
Box 13: Lending Circles in Los Angeles

Lending circles are a long-standing tradition in several cultures. They are a way to provide loans to people who do not have a strong credit history. LIFT partners with a nonprofit, Mission Asset Fund, to offer lending circles to its participants. Participants each pay a regular amount into a fund and then take turns requesting loans from the funds. For example, if a circle has 10 participants who each devote $10 a month for 12 months, one participant can receive a loan of $1,200 at the end of the year. To improve participants' credit scores, the Fund provides information on the lending circle to three credit bureaus. The circles aim to develop strong saving behaviors that turn into habits that continue outside of the lending circle. The circles also act as a social network among participants. LIFT reports a less than a 1 percent default rate in the lending circles.

The Los Angeles program offered workshops on financial and career topics in English and Spanish monthly and provided childcare and meals for families during the workshops. A supervisor indicated: "One strength of the program are the workshops, which are very effective at informing parents and allowing them to bring their newfound knowledge back to their coaches. They allow participants to be more empowered to gain further education on new topics." The financial coaching workshop series involved four separate workshops that focused on basic finances, online banking, online security, and improving technological skills. The career-skills workshop included interviewing, wherein LIFT invites professionals from different fields to conduct mock interviews.

Finally, offices hosted holiday parties to encourage camaraderie among participants. For example, the Los Angeles office hosts an annual holiday fiesta. Participants are paired with a sponsor (a financial supporter of LIFT) who provides presents for the holidays. Participants form relationships with sponsors at this event that can give participants' access to a wider network and are valued by both sponsors and participants. The Chicago office also hosts a holiday party, where participants can mingle, and their children receive gifts donated by LIFT supporters and community members.

Flyers display resources for LIFT participants.



(Photo: Rich Clement, Mathematica)

V. Summary

LIFT, a nonprofit organization in Chicago, Los Angeles, New York City, and Washington, D.C., uses coaching to help participants set and attain goals related to three areas of self-sufficiency: financial, career, and education.

Following the first month in the program, in which the participant should have two coaching sessions, one with an intake worker and one with the assigned coach, coaches and participants aimed to meet monthly for two years. Over the first nine months after study enrollment, coaches and participants met on average for 6.5 coaching sessions.

Coaches are unpaid interns, generally MSW students fulfilling degree-related field placement requirements. Program leadership cited multiple benefits to using student coaches. Because they are unpaid, they reduce the cost of the program overall, and they are highly educated and thus learn material and the coaching process quickly. The primary disadvantage of student coaches is the mismatch between the coach's tenure in the program (a nine-month academic year) and the two-year duration of the program. This means that, at some point, participants who remain in the program for the full two years must build a relationship with a new coach at least once during their timeime in the program.

In addition to coaching, LIFT provided financial incentives to encourage ongoing participation, up to $150 quarterly and not to exceed $1,000 in total. Participants had different perspectives on the extent to which the incentives affected their engagement in the program. Finally, each location provided other services to strengthen participant skills and networks, such as financial education workshops and social events like holiday parties.

Future reports from the Evaluation of Employment Coaching for TANF and Related Populations will include: reports of the design and implementation of the other interventions in the evaluation; a synthesis of findings from the descriptive studies of all interventions; and reports on the impacts of each intervention on participants' self-regulation, employment, earnings, self-sufficiency, and other measures of well-being. These reports will be available at the project's website (here).

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Appendix A: Evaluation Design

The ***Evaluation of Employment Coaching for TANF and Related Populations*** aims to learn more about the potential of different coaching approaches in helping low-income adults become more economically secure. The study's primary research questions are as follows:

1. Do the employment coaching interventions improve the outcomes of low-income people?
   - Do the employment coaching interventions affect participants' intermediate outcomes related to goal pursuit and other skills associated with labor market success?
   - Do the employment coaching interventions affect participants' employment and economic security outcomes?
   - How do the impacts of the coaching-focused interventions change over time?
   - Are the employment coaching interventions more effective for some groups of participants than others?
2. How were the employment coaching interventions implemented?
   - What is the intervention design?
   - What factors appear to have impeded or facilitated implementation of the program as designed?
   - What were the clients' experiences with coaching, what services did they receive, and what types of coaching and other services did control group members receive?

The evaluation is examining four separate coaching interventions (Exhibit A-1). It includes an impact study and an implementation study.

Exhibit A.1 Coaching Programs and Study Locations

Program	Provider	Program Description	Study Location
Family Development and Self-Sufficiency (FaDSS)	Local human services agencies ("Community Action Agencies") under contract to the Iowa Department of Human Rights.	Provides TANF participants with employment coaching during home visits.	Iowa, select agencies*
Goal4 It!	County TANF agency.	Employment coaching intervention being piloted as an alternative to case management.	Jefferson County, CO
LIFT	Nonprofit organization.	Provides career and financial coaching to parents and caregivers of young children.	Chicago, IL Los Angeles, CA New York, NY*
MyGoals for Employment Success	Baltimore and Houston Housing Authorities.	Coaching demonstration project that provides employment coaching and incentives to unemployed adults receiving housing assistance.	Baltimore, MD Houston, TX

* LIFT also operates in Washington, DC, but that location is not participating in the evaluation.

The **impact study** uses an experimental research design that includes randomly assigning eligible individuals who consent to participate either to a treatment group with access to the coaching intervention or to a control group that cannot access the coaching intervention but can receive other services in the community. Enrollment into the study occurred at different times in each program, but all programs ended enrollment by November 2019. The study assesses differences in outcomes related to self-regulation skills, employment, earnings, receipt of public assistance, and other measures of personal and family well-being.

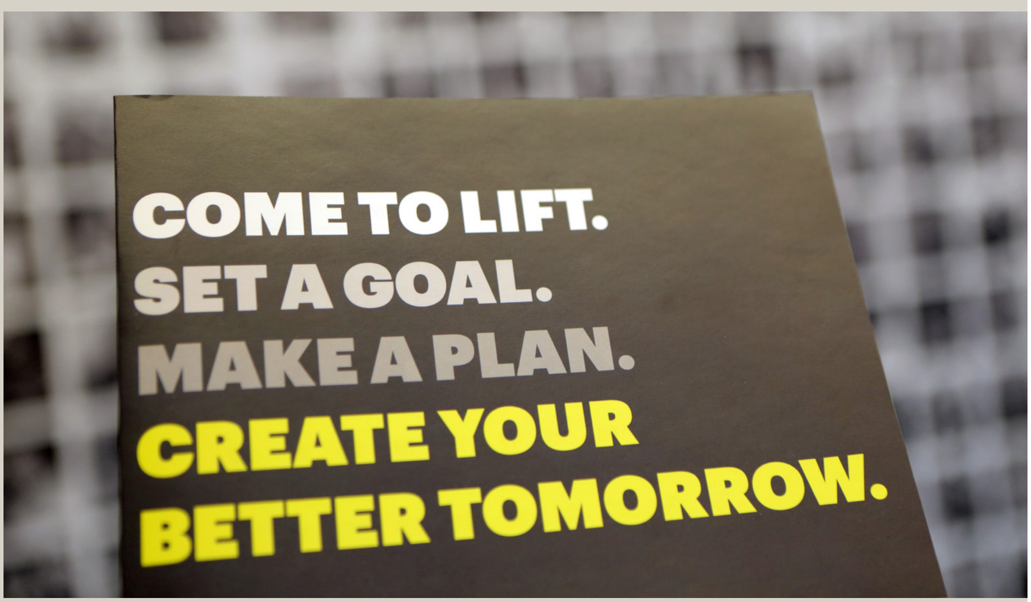
The impact study data sources are:

- A baseline survey of study participants administered at study entry and two follow-up surveys administered approximately 9-12 months and 21 months after study enrollment.
- Administrative records of employment, earnings, and Unemployment Insurance receipt from the National Directory of New Hires operated by the Office of Child Support Enforcement within the Administration for Children and Families, U.S. Department of Health and Human Services.
- Administrative records of TANF receipt and, for some programs, SNAP receipt.

The **implementation study** provides important context for understanding and interpreting the findings from the impact study and supports future replication of employment coaching interventions. The implementation study data sources are:

- A baseline survey of study participants administered at study entry, with timing varying by study intervention (between February 2017 and November 2019).
- A survey of program managers and staff conducted between January and March 2019.
- In-person discussions with program management and staff and direct observations of coaching sessions between April and June 2019.
- Video recordings of coaching sessions conducted between April and July 2019.

LIFT marketing materials highlight the goal setting process.



(Photo: Rich Clement, Mathematica)

- In-depth, in-person interviews with coaching participants conducted between March and May 2019.
- Service receipt data as reported by program staff and recorded in the study's data tracking system or the program's management information system.
- Document reviews, such as policy and procedure manuals, training manuals, curricula, participant enrollment forms, assessment forms, and forms used to document coaching sessions and other activities.
- Secondary data on local economic conditions.

Further details about the design of the impact and implementation studies, including analysis methods, are included in the project's *Evaluation Design Report* (Moore et al., 2019). Reports from the evaluation are available online (here).

THE EVALUATION OF LIFT

The evaluation of LIFT began in June 2018, when program staff started randomly assigning potential participants to the treatment group that could participate in LIFT or the control group that could not participate in LIFT. Of the four LIFT sites, three are participating in the evaluation: Chicago, Los Angeles, and New York City. The evaluation excluded the Washington, D.C. site due to its small size.

Program staff conducted a baseline survey of all study participants (program and control group; n=808) administered just before study enrollment (between June 2018 and November 2019). Program managers and supervisors (*n*=5) and staff (coaches and intake staff, *n*=30) responded to a web-based survey about the program and its participants between January and March 2019. The evaluation team visited the Chicago and New York offices in March 2019, and the Los Angeles office in April 2019. During these visits, the evaluation team conducted in-person discussions with program managers, supervisors, coaches, and intake staff, as well as directly observed coaching sessions. While on site, the evaluation team also collected program documents (such training materials) and annual reports for later review. The team also collected secondary data on local economic conditions around the time of study enrollment. The evaluation team examined 15 video recordings of coaching sessions that occurred between April and June 2019 in Chicago (*n*=10) and New York City (*n*=5). The evaluation team also conducted in-depth, in-person interviews with four LIFT Chicago participants and five New York City LIFT participants in May 2019. The team did not interview participants in LIFT Los Angeles because of the large Spanish-speaking population and the team's lack of capacity to conduct the interviews in Spanish.

Finally, the implementation study draws on service receipt data recorded by program staff in LIFT's management information system. This report presents information on service receipt for all treatment group members who enrolled in the study. This information includes the number, type, and length of coaching sessions that LIFT participants attended, as well as the topics of discussion during sessions.

Appendix B: Supplemental Tables

Exhibit B.1 Baseline Characteristics for LIFT Program Group

Baseline characteristic	LIFT Overall	Chicago	Los Angeles	New York City
Demographics				
Average age (in years)	33.2	32.6	33.4	33.4
Female (percentage)	94.6	94.7	94.6	94.4
Race and ethnicity (percentage)				
Hispanic	70.3	9.7	93.6	76.4
Black, non-Hispanic	27.7	84.9	5.5	22.5
White, non-Hispanic	0.7	3.2	0.0	0.0
Other	1.2	2.2	0.9	1.1
Currently married (percentage)	31.3	14.9	37.3	34.1
Number of adults with whom respondent lives	2.2	1.8	2.4	2.1
Number of children with whom respondent lives	2.3	2.0	2.5	2.2
Socioeconomic status				
Education level (percentage)				
Did not complete high school or GED	38.3	4.3	56.8	28.1
High school diploma	21.7	18.1	17.6	36.0
GED certificate	2.7	2.1	2.7	3.4
Some college but no degree	18.5	30.9	13.1	19.1
2-year or 3-year college degree (Associate degree)	7.9	14.9	5.4	6.7
4-year college degree (Bachelor's degree)	9.1	23.4	4.1	6.7
Graduate or professional degree	1.7	6.4	0.5	0.0
Never attended school	0.0	0.0	0.0	0.0
Receiving any income from public assistance/social insurance program (percentage)	84.8	77.7	87.2	86.5
Employment status and history				
Worked for pay in past 30 days (percentage)	53.1	90.4	36.9	54.0
Earnings in past 30 days ($)				
Earnings among all	634	1,298	412	482
Earnings among those who worked	1,197	1,435	1,124	892
Hours worked per week at current or most recent job (percentage)				
Not working	47.3	9.6	63.1	47.6
Part-time (under 35 hours)	34.5	52.1	25.7	38.1
Full-time (35 hours or more)	18.3	38.3	11.3	14.3

Exhibit B.1 Baseline Characteristics for LIFT Program Group

Baseline characteristic	LIFT Overall	Chicago	Los Angeles	New York City
Employment barriers				
Challenges that study participants reported made it very or extremely hard to find or keep a good job (percentage)				
Lack of transportation	19.1	16.0	19.9	20.2
Lack of childcare	39.7	30.9	39.8	48.9
Lack of right clothes or tools for work	16.8	9.6	20.0	16.3
Lack of the right skills or education	32.6	13.8	40.3	33.3
Perceived lack of jobs in area	36.5	29.0	35.3	47.7
Having a criminal record	9.8	12.8	9.4	7.5
Health condition preventing working	14.6	2.1	19.3	16.3
No valid driver's license (percentage)	57.8	31.9	58.1	84.3
Unstable housing (percentage)	10.6	20.2	5.4	13.5

Source: Baseline survey for treatment group members (*n*=405).
Note: Missing data rates ranged between 0 percent and 10 percent.

Exhibit B.2 Total Contact Time and Average Length of Coaching Sessions

Contact Measure	LIFT Overall	Chicago	Los Angeles	New York City
Total contact time (hours)	6.4	7.5	6.3	5.5
Average length of each contact (minutes)	58.4	56.8	58.8	60.0
Average length of first contact	61.5	60.0	60.4	66.0
Average length of subsequent contact	57.9	56.3	58.5	58.7

Source: LIFT's management information system (*n*=404).
Note: Sample size reflects one participant who withdrew from the study.

Exhibit B.3 Program Activities per Person in First Nine Months after Study Enrollment

Program Activity	LIFT Overall		Chicago		Los Angeles		New York City	
Number and percent of sessions that included								
Goal setting	3.7	57%	4.7	59%	3.7	58%	2.4	44%
Development of action steps	3.8	58%	5.6	71%	3.4	53%	2.7	49%
Discussion of next steps	4.7	72%	6.8	86%	4.2	66%	3.5	64%
Contacts with identification of new action steps to be taken between contacts	5.5	85%	7.0	89%	5.4	84%	4.3	78%
Average Number of Sessions	6.5	—	7.9	—	6.4	—	5.5	—

Source: LIFT's management information system (*n*=404).
Note: Sample size reflects one participant who withdrew from the study.

Exhibit B.4 Action Step Completion in First Nine Months after Study Enrollment

Aspect of coaching compliance	LIFT Overall	Chicago	Los Angeles	New York City
Non-completion				
Percentage of participants who had at least one action step that was agreed upon but not completed	36.5	47.0	32.2	34.9
Percentage of agreed upon action steps participants did not complete	9.6	10.5	8.1	22.5
Percentage who fully or partially completed all agreed upon action steps	63.5	53.0	67.8	65.1
Percentage who did not complete 1 agreed upon action step	23.2	31.3	22.2	15.9
Percentage who did not complete 2 agreed upon action steps	8.9	10.8	7.8	9.5
Percentage who did not complete 3 agreed upon action steps	3.4	2.4	2.2	7.9
Percentage who did not complete 4 agreed upon action steps	0.9	2.4	0.0	1.6
Partial completion				
Percentage of participants who partially completed at least one agreed upon action step	85.0	92.8	81.1	85.7
Percentage of agreed upon action steps participants partially completed	50.0	65.3	41.0	51.3
Percentage who partially completed 0 agreed upon action steps	15.0	7.2	18.9	14.3
Percentage who partially completed 1 agreed upon action step	19.0	10.8	21.7	22.2
Percentage who partially completed 2 agreed upon action steps	18.4	4.8	23.3	22.2
Percentage who partially completed 3 agreed upon action steps	13.5	15.7	13.3	11.1
Percentage who partially completed 4 agreed upon action steps	9.5	9.6	10.0	7.9
Percentage who partially completed 5 agreed upon action steps	10.1	18.1	5.6	12.7
Percentage who partially completed 6 agreed upon action steps	7.1	15.7	3.3	6.3
Percentage who partially completed more than 6 agreed upon action steps	7.4	18.1	3.9	3.2

Exhibit B.4 Action Step Completion in First Nine Months after Study Enrollment

Aspect of coaching compliance	LIFT Overall	Chicago	Los Angeles	New York City
Completion				
Percentage of participants who completed at least one agreed upon action step	78.5	72.3	86.1	65.1
Percentage of agreed upon action steps participants completed	40.4	24.2	50.9	35.7
Percentage who completed 0 agreed upon action steps	21.5	27.7	13.9	34.9
Percentage who completed 1 agreed upon action step	24.5	26.5	25.6	19.0
Percentage who completed 2 agreed upon action steps	15.6	20.5	12.2	19.0
Percentage who completed 3 agreed upon action steps	12.6	13.3	13.3	9.5
Percentage who completed 4 agreed upon action steps	8.3	7.2	10.0	4.8
Percentage who completed 5 agreed upon action steps	7.7	3.6	10.0	6.3
Percentage who completed 6 agreed upon action steps	6.4	1.2	9.4	4.8
Percentage who completed more than 6 agreed upon action steps	3.4	0.0	5.6	1.6

Source: LIFT's management information system (*n*=326).

Note: Sample only includes participants who agreed upon action steps during a meeting with their coach.

Exhibit B.5 Coach Characteristics and Background

Coach characteristic	LIFT Overall	Chicago	Los Angeles	New York City
Demographics				
Average age (years)	29	25	29	35
Female (percentage)	86	92	85	80
Race and ethnicity (percentage):				
Hispanic	57	25	85	60
Black, non-Hispanic	9	8	7	10
White, non-Hispanic	29	58	7	20
Other	6	8	0	10
Socioeconomic status (percentage)				
Education level (percentage)				
Some college but no degree	3	8	0	0
4-year college degree (Bachelor's degree)	76	75	77	78
Graduate or professional degree	21	17	23	22
Total coaching experience (percentage)				
None	7	11	10	0
Less than 1 year	60	67	20	100
1 year to less than 3 years	15	0	40	0
3 to 5 years	15	22	20	0
More than 5 years	4	0	10	0

Source: LIFT staff survey (*n*=30).

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