

# InFOCUS

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## Mobile Coaching: Innovation and small-scale experimentation to better engage program participants in rural Colorado

### WHAT IS A ROAD TEST?

A road test is an iterative, rapid prototyping process that involves multiple cycles of testing, refining, and strengthening the design and implementation of a new program strategy before scaling. It begins by implementing the new approach on a small scale in a contained practice setting. See our [practice guide](#) for more information.

Access to reliable transportation is a common challenge in rural communities across the country, especially for low-income families who may have few public transit options, if any. Lack of transportation may interfere with families' ability to access workforce, health care, and a variety of other services they may need. Human services providers encounter this challenge regularly with the families they serve. For example, Temporary Assistance for Needy Families (TANF) programs require eligible parents to take part in federally defined work activities in order to receive benefits, and direct service staff often cite transportation as a major barrier to parents' program participation and employment.

This issue is a familiar one to the La Plata County Department of Human Services (DHS). Situated among the San Juan Mountains in the southwestern corner of Colorado, La Plata County is geographically dispersed over 1,700 square miles. Public transit is limited to a small bus network centered in the county seat of Durango and a few medical transportation providers. Beyond that, travel by car is the only way to reach the DHS office, and parents often rely on rides from relatives and friends to attend DHS appointments and access services in town. For the approximately 125 families enrolled in the county's TANF program, known statewide as Colorado Works, this lack of reliable transportation is a major hindrance to their ability to meet TANF requirements.

This brief describes the development of and lessons learned from an innovative strategy designed by the county's Colorado Works team to address these transportation challenges and coach parents on planning and achieving their goals at the same time. Between March and August 2018, the team explored this approach and conducted research to generate formative insights for refining and sustaining this new and interesting intervention.

### MOBILE COACHING: ONE CREATIVE CHANGE TO ADDRESS MULTIPLE AIMS

Like many TANF programs, Colorado Works has had limited success in removing clients' transportation barriers. La Plata County DHS had found that, when families were without a car, lacked access to public transit, or could not

get rides from friends or family, the program was unable to offer much help. The families, in turn, tended to miss program appointments and did not follow through on referrals to other services in the community, such as mental health clinics, adult basic education, or the workforce center.

In September 2016, the Colorado Works team in La Plata began considering creative solutions to address this persistent problem. Over nine



### WHAT IS A ROAD MAP?

A road map is a detailed plan for how a proposed strategy (such as Mobile Coaching) will work. The road map also defines specific changes the strategy should target (such as attitudinal or behavioral shifts), along with measurable outputs and outcomes. A road map helps draw out the assumed causal connections between the proposed strategies and the anticipated results.

months, the team developed and “road tested” its strategy (see sidebar), called Mobile Coaching. The approach involves case managers directly transporting clients to an appointment or service provider in the community and using the time in transit for meaningful conversation with the client. From this initial road test, the team found that the intervention worked well when used strategically with clients who experienced difficulties securing transportation to and from community service providers, even though it required a considerable amount of staff time to implement. More specifically, the road test suggested that clients who had already tried—but had not yet succeeded in—connecting with a community service provider were best positioned to benefit from this strategy, as opposed to using Mobile Coaching with any client who identified a transportation challenge.

Drawing on insights from this initial phase of implementation, the county’s Colorado Works team reconvened in January 2018 to refine its “road map” for change (see sidebar) and to plan a second road test, coupled with a more intentional research plan. Mathematica Policy Research, with support from the Administration for Children and Families’ Office of Planning, Research, and Evaluation, provided technical assistance to the La Plata team on its research design through the *Advancing Welfare and Family Self-Sufficiency* Research project. In particular, the team defined Mobile Coaching as a two-pronged strategy: (1) a client-oriented approach that provides coaching while transporting clients to and from community partners and (2) a program-oriented approach focused on strengthening program staff’s relationships with these community partners. Figure 1 shows the road map for the Mobile Coaching strategy.

### Road map for Mobile Coaching

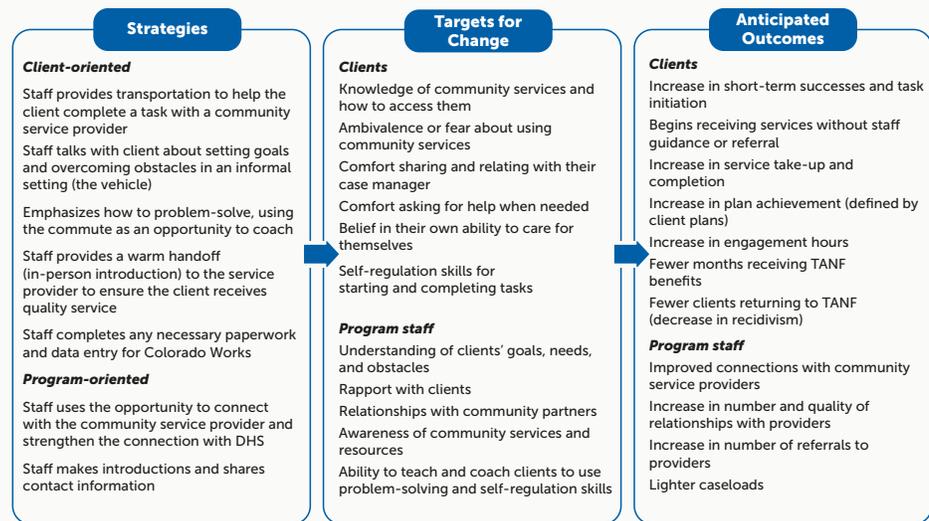
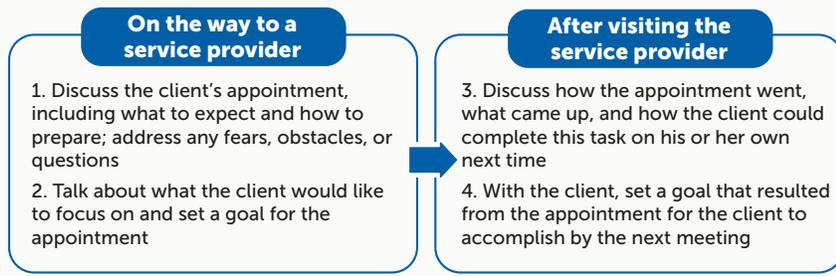


Figure 1

### Four-point process for Mobile Coaching



**Figure 2**

For the client-oriented aspect of Mobile Coaching, the La Plata team defined its approach in terms of a four-point process that aims to guide case managers' conversations with clients about completing the task at hand. Figure 2 shows the team's basic coaching process, based on the set of targets for change in the road map. Each Mobile Coaching session also included key elements of a TANF case management meeting, including updating the client's participation plan.

### USING RESEARCH METHODS TO LEARN AND IMPROVE

The county's Colorado Works team identified a list of learning objectives at the outset of this second road test of Mobile Coaching, defining specific ways in which it would use analytic methods to answer questions of interest. The team paired each learning objective with a source of information and a low-burden method for gathering that information (Table 1). It is important to note that these methods were used only to generate formative insights about Mobile Coaching, and were not intended to address whether the intervention had a causal impact. Different research methods would need to be applied for answering these types of learning objectives.

#### Learning objectives and sources of information for the road test

Learning objective	Source of information to address the learning objective	Method to gather the information
How does Mobile Coaching help clients connect with and use community services?	<b>Clients' perceptions</b> of how Mobile Coaching supports their ability to connect with and use the services they need in the community	Short pre/post survey
How does Mobile Coaching help case managers tailor plans and services to the strengths and needs of clients?	<b>Case managers' perceptions</b> of the "goodness of fit" of the plans they create with Mobile Coaching clients	Monthly staff focus groups
How does Mobile Coaching help clients take the initiative to engage with community services?	<b>Clients' self-perceptions</b> of their ability and confidence to connect with and use the services they need in the community	Post survey
How does Mobile Coaching affect community partners' perceptions of the La Plata County Colorado Works program and its clients?	<b>Community service providers' perceptions</b> of Colorado Works and its clients	Short web-based survey after the provider interacted with a case manager

**Table 1**

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## STAFF INSIGHTS AND LESSONS LEARNED

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Over the course of a six-month road test period, three case managers completed a total of 12 Mobile Coaching sessions with different TANF clients. Although the design of this road test was not intended to lead to strong conclusions about the efficacy of this approach, several important themes emerged from the qualitative data gathered through this process.

### **“Our clients have goals and dreams.”**

The finding that Colorado Works clients “have goals and dreams” may not have been a groundbreaking insight, but case managers became more aware and developed a deeper emotional understanding of clients’ aspirations by interacting with clients in a different, more intentional way. In reflecting on their experiences, staff highlighted an observable shift in their conversations with clients during Mobile Coaching sessions, relative to typical in-office case management meetings. Case managers learned of their clients’ hobbies, skills, and wishes, which had never before come up in their monthly one-on-one meetings. One case manager found great value in better “knowing what a client goes through, [which] makes it a lot easier to relate with our clients.” This strategy challenged and reconfigured both case managers’ and clients’ preconceived assumptions about one another for the better.

### **“That one thing...can get the ball rolling.”**

Most Mobile Coaching sessions involved tasks such as filing a Section 8 housing application, attending a Supplemental Security Income hearing, picking up documentation from the local housing authority, or visiting the public health department. While seemingly straightforward, case managers noted that these tasks proved to be long-standing obstacles to further progress with their clients. One case manager described a homeless client whose Mobile Coaching visit to the housing authority for a vulnerability assessment led to her immediate approval for temporary housing assistance. Another case manager described a Mobile Coaching visit to the housing authority to pick up some documentation, which allowed the client to move forward from an assistance denial and explore other options for her family. At least two clients who took part in Mobile Coaching sessions and

had not been participating in any TANF work-related activities took significant steps forward in the month following their sessions and reported TANF work-related activities.

### **“Clients were ready to move sooner than I could.”**

Mobile Coaching is an intensive strategy relative to the team’s standard approach to case management. It requires advance scheduling, a commitment of resources, logistical coordination (such as reserving a county vehicle), and spending considerably more time with one client. These sessions typically lasted two to four hours, compared with 30- to 60-minute meetings in the office, so the approach also affects the number of clients a given case manager is able to see. Case managers noted that, sometimes, a good portion of the Mobile Coaching session could be spent “waiting around” while the client worked with the local service provider. This, at times, felt inefficient—“that voice in the back of my head was saying that I needed to get back [to the office],” described one case manager. In addition, case managers typically had to schedule Mobile Coaching sessions weeks in advance, given the amount of time needed and to ensure availability of a county vehicle. This timeline seemed disjointed given that clients often wanted to move more quickly on their needs—for example, scheduling a visit to the housing office the next day. Despite these logistical challenges, case managers reported no negative implications of this strategy for their workloads and described “how much more [gets] done in those two hours than [could be done] in a meeting in the office.”

### **“Everything we’ve done as a team. It enhanced our team. That was big.”**

Beyond the Mobile Coaching strategy itself, the team highlighted an important byproduct of its innovation experience as a whole, which relates to its development and learning as a team. Program leaders described the value of being intentional about the design process—as one staff described it, moving from feeling “a little scattered” with the team’s initial ideas to a concrete strategy and “being able to talk about the benefits and challenges” together. Team members also described some incremental progress in their connections to other service providers in their community. For example, as a result of a case manager conducting a Mobile Coaching visit to one local provider, a long anticipated opportunity

emerged for a phone call between the two agencies; through this, the Colorado Works team gained a much clearer understanding of the other agency's process for screening and determining applicants' eligibility for assistance

## CLIENTS' EXPERIENCES WITH MOBILE COACHING

According to case managers, clients' views of staff appeared to shift as a result of Mobile Coaching experiences. As one client reportedly described it, staff "aren't just sitting here behind a computer giving and taking away benefits." Staff noted that clients were at times surprised by the offer of a Mobile Coaching session, responding with comments along the lines of, "I didn't know you could do that." Of the 12 clients who took part in a Mobile Coaching session, six completed a post-visit survey sharing their perspectives; only four of these six clients had also completed a pre-visit survey. Of these four clients:

- Three clients reported no access to a car and most frequently rode with family or friends to get around town.
- Two clients expressed a shift in their perspectives with respect to transportation getting in the way of accessing the services they need, seeing this as less of a problem after Mobile Coaching.
- One client expressed a shift in their perspective about transportation causing her stress on a regular basis, seeing this as less of a problem after Mobile Coaching.
- Three clients indicated that the Mobile Coaching session reduced a source of fear or anxiety.
- All four clients named transportation as a challenge for themselves and their families both before and after Mobile Coaching.
- All four clients indicated they were more comfortable with their case manager, felt more supported by the program, knew more about available community services, and felt more confident in their skills and abilities after Mobile Coaching.

Several aspects of implementation should be taken into consideration before applying La Plata County's innovation in another setting. For example, although the county was able to take advantage of an existing vehicle fleet and experienced reasonably low fuel costs, these circumstances may not be the case in other jurisdictions, which could require considerable financial investment to implement this approach. Moreover, small caseloads and a generally flexible office culture appear to have facilitated the use of Mobile Coaching in La Plata County. Agencies with larger caseloads may not be able to afford the increase in time spent per client. It also is not yet clear to what extent Mobile Coaching improves outcomes as outlined in the road map for change; more rigorous testing is warranted to better understand the effectiveness of this innovative approach. The La Plata County team's experience serves as an example to other human services agencies—particularly those of a smaller size and rural context—for pursuing innovation and small-scale experimentation to solve program challenges, guided by an analytic approach to change. To learn more about the framework used to guide the team's efforts, check out [this brief](#), which describes the Learn, Innovate, Improve (LI<sup>2</sup>) process.

## ENDNOTES

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### Strengthening connections with service providers in the community

All three service providers who completed a survey after the Mobile Coaching visit indicated they would be willing to receive a direct client referral for service.

One service provider indicated a change in perception of TANF participants based on a Mobile Coaching visit, from "leaned negative" to "more positive".

