



## Evaluation of Employment Coaching for TANF and Related Populations



# MyGoals for Employment Success: Implementation Findings from the Evaluation of Employment Coaching

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## Overview

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This report summarizes the design and implementation of **MyGoals for Employment Success (MyGoals)**, an experimental employment coaching demonstration program developed by MDRC, a research organization, with assistance from Arnold Ventures and other funders, and launched in early 2017. The program aims to help recipients of housing assistance in Baltimore and Houston who are unemployed or working less than 20 hours a month set and achieve employment and related goals. Coaches follow a systematic process that focuses explicitly on self-regulation skills—the skills needed to finish tasks, stay organized, and control emotions. Financial incentives are offered for attending coaching sessions and achieving employment outcomes. MyGoals 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, the evaluation aims to learn more about the potential of different coaching approaches in helping adults with low income become more economically secure. The evaluation, conducted by Mathematica and Abt Associates, includes an implementation study and an impact study.

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

### RESEARCH QUESTIONS

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The report answers the following research question:

- **How was MyGoals implemented?**

- What was the program's design?
- What factors appeared to impede or facilitate implementation of MyGoals as designed?
- What were participants' experiences with coaching and what services did they receive?

### PURPOSE

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This report describes MyGoals'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 MyGoals impact study. The findings will also support future replication of employment coaching interventions.

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## HIGHLIGHTS

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Key findings from the implementation study are:

- The MyGoals coaching model is complex, with a 12-step process, a nested hierarchy of goal levels, and four domains for goal-setting. Coaches initially found it difficult to master all components; additional training and technical assistance helped coaches understand the model and its flexibility.
- Coaches reported that the MyGoals coaching tools were helpful. In line with the program design, coaches used some tools early in the coaching relationship and others in later sessions.
- Per the MyGoals design, coaches discussed self-regulation skills explicitly with participants.
- Coaches focused on developing strong and trusting relationships with participants; many participants reported positive relationships with their coaches.
- While coaches were generally nondirective, some coaches struggled with this aspect of coaching.
- MyGoals coaches had four-year degrees and prior experience in social services. Additionally, most had experience in coaching (though not always employment coaching). Their qualifications and the training they received from program designers contributed to their ability to learn and implement the complex model.
- In alignment with the design, participants and coaches had monthly contact; by month nine, about two-thirds of participants were still participating in MyGoals.
- Coaches and participants had mixed perceptions regarding the value of incentives.
- Participants reported receipt of referrals and other supports, but some indicated more direct employment assistance, such as concrete job search resources, would also be helpful.

## METHODS

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The report is based on the following data sources:

- In-person interviews with 13 MyGoals staff and coaching observations during site visits to Houston and Baltimore in April 2019, with additional in-person interviews of staff and coaching observations in one Baltimore MyGoals office occurring in November 2019;
- A staff survey of 13 coaches and supervisors (winter 2019);
- Participant demographic, economic, and educational information from two sources: (1) a baseline information form completed when participants enrolled in the study (between February 2017 and September 2019), and (2) administrative data collected by the public housing authorities at the time the participants last certified for housing benefits prior to enrolling in MyGoals;

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- In-depth, in-person interviews with nine participants in Baltimore and 11 participants in Houston (spring 2019);
  - Video recordings of 14 coaching sessions in Baltimore and 15 coaching sessions in Houston (between May and July 2019);
  - Service receipt data from the MyGoals service tracking system (from February 2017 through December 2020);
  - Telephone discussions with three program designers (spring 2019) and seven additional technical assistance providers from MDRC (October 2018 to January 2021);
  - Reviews of documents, such as policy and procedure manuals, training manuals, curricula, participant enrollment forms, assessment forms, and forms used to document coaching sessions and other activities; and
  - Secondary data on local economic conditions.

**A MyGoals coach and a participant engage in a coaching session.**



(Photo: Rich Clement, Mathematica)



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## Executive Summary

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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, and self-sufficiency of study participants. This report describes the design and implementation of one of the interventions—MyGoals for Employment Success (MyGoals)—which was designed as a demonstration and operates through housing assistance agencies in Houston and Baltimore.

*The MyGoals Program Model.* MDRC, a research organization, developed MyGoals as an experimental demonstration program with assistance from Arnold Ventures and other funders. Through a program of structured coaching with financial incentives, MyGoals aims to help recipients of housing assistance in Baltimore and Houston (1) obtain and retain employment and (2) ultimately make progress toward self-sufficiency. Coaches and participants meet at the housing office or virtually at least monthly to discuss goal setting across four domains: employment, education and training, personal and family well-being, and financial management. Participants also learn about self-regulation skills—referred to as executive skills—and apply strategies for goal achievement that build on their strengths. Participants can earn financial incentives of up to \$5,000 during the three-year program if they attend coaching sessions regularly and meet multiple employment goals.

*Participants.* To be eligible for MyGoals, potential participants must be an adult member of a household receiving federal housing assistance (through a housing choice voucher or living in public housing) and be either unemployed or working fewer than 20 hours per month. Potential participants also must demonstrate that they are legally able to work in the United States and must not be participating in other, similar employment support programs offered through the housing authority. The three-year program is voluntary, and participants can remain in the program even if they stop receiving housing assistance. Almost all MyGoals study participants are female; on average, they are in their late 30s. Per MyGoals eligibility criteria, all participants were unemployed or working less than 20 hours at the time of study enrollment. MyGoals participants had challenges to employment; a substantial minority (30 percent in Baltimore and 19 percent in Houston) had a documented disability. Nearly three-quarters of participants had a high school diploma or a General Educational Development (GED) certificate at the time of study enrollment.

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**Two MyGoals coaches meet between coaching sessions.**



(Photo: Rich Clement, Mathematica)

*MyGoals in Practice.* Because MyGoals is a demonstration program, implementation continues to evolve over time in response to ongoing communication between coaches and program designers. As coaches described challenges implementing some aspects of the program, designers made modifications or clarified processes.

Key findings from the implementation study are:

- **The complex MyGoals coaching model was challenging for coaches to master immediately; coaches needed additional training and technical assistance to understand the model’s flexibility.** The coaches reported that the 12-step coaching process (supported through program-specific assessments and tools), a nested hierarchy of goal types (including short- intermediate- and long-term goals), and four domains for goal setting were difficult to master. Through additional training and ongoing communication with the program designers, coaches learned that the 12-step process and goal hierarchy should be responsive to the participant’s situation and need not be linear. Goal setting patterns reflect the application of this flexibility. In the first nine months after enrollment, participants in both cities were more likely to set intermediate goals than long-term goals.
- **Coaches reported that the coaching tools were helpful and that their use differed between the initial session and subsequent sessions.** Staff survey results indicate that 90 percent of coaches rate the two tools used in the initial coaching session—the Executive Skills Questionnaire and the Getting to Know You Questionnaire—as either “valuable” or “extremely valuable.” After the initial session, coaches reported using tools less frequently. They used goal planning forms to document participants’ progress toward making and achieving goals. When relevant, they shared up-to-date information from updates provided through the New York City Labor Market Information Service (NYCLMIS) on the local labor market.

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- **Per the MyGoals design, coaches discussed executive skills explicitly with participants.** A hallmark of MyGoals is the explicit focus on participants' executive skills. Coaches and participants review participants' assessment of their strengths and areas of growth in these skills. Coaches reported that it was helpful to revisit the skills assessments over time as participants learn about their executive skills through practicing goal setting. They reported that understanding their strengths and weaknesses in executive skills helped participants practice “workarounds” to challenges they faced.
  - **Coaches focused on developing strong and trusting relationships with participants; many participants reported positive relationships with their coaches.** Coaches noted the importance of developing rapport from the first meeting; one way coaches do this is by sharing their own stories and experiences. During site visits in both cities, some coaches commented that having grown up in the same neighborhood as participants—and having faced similar circumstances such as safety issues, lack of employment opportunities, and geographic isolation—also builds trust. During in-depth interviews, participants described strong, positive relationships with their coaches.
  - **While coaches generally were nondirective (that is, they did not tell participants what to do), some struggled with this aspect of coaching.** Coaches noted that remaining nondirective is central to the coach-participant relationship but acknowledged that it is a skill that takes time to learn. Coaches described scenarios in which remaining nondirective is more difficult: for instance, when they have knowledge and resources they want to share, when a participant doesn't seem to be making progress, or when a participant expects the coach to step in and be more directive.
  - **Participants reported receipt of referrals and other supports, but some indicated more direct employment assistance would also be helpful.** Although MyGoals does not provide direct services such as mental health counseling, job training, or financial assistance (other than the incentives), coaches make referrals to outside agencies when asked. Coaches also bring partners on site to provide learning opportunities for participants. However, during in-depth interviews with a small number of participants, almost half indicated that the program should offer more concrete job search resources, such as interviewing skills training, job fairs, and job placements, including “warm” referrals to a hiring manager.
  - **MyGoals coaches' qualifications and the training they received from program designers contributed to their ability to learn and implement the complex model.** MyGoals coaches had at least a four-year degree and prior experience in a range of related areas, including substance abuse counseling, social services, homeless services, and case management. Most also reported having some prior coaching experience (though not necessarily employment coaching). Building on their education and experience, MyGoals designers offered initial and ongoing training for coaches, as well as ongoing technical assistance to troubleshoot challenges in implementing the model and to discuss specific participants' situations. Coaches reported that the training was valuable in helping them understand and implement the program.

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- **Participants and coaches had monthly contact, as planned; by month nine, about two-thirds of participants were still participating in the program.** During the first nine months after enrollment, participants, on average, had contact with their coach about once per month, which included coaching, as well as phone and email check-ins and scheduling contacts. Most participants had at least one substantive contact with a coach in the first nine months, and approximately one in three participants had seven to nine substantive contacts, which are defined as contacts that include at least 20-30 minutes of goal-setting, discussing accomplishments or obstacles, and documentation of an action plan or next steps. Participation remained high over time. After the first month of enrollment, nearly all participants (90 percent in Baltimore and 95 percent in Houston) had some contact with their coach; by the ninth month after study enrollment, seven out of ten participants in both cities were still in contact with their coach.
  - **Coaches and participants had mixed perceptions regarding the value of incentives.** MyGoals offered participants an opportunity to earn incentives for completing the initial intake process, engaging in the program through attendance at coaching sessions, and reaching employment-related goals. Most participants in both cities received at least one engagement incentive for completing intake and attending coaching sessions, with more participants earning incentives in Houston than Baltimore (86 percent versus 77 percent, respectively). Among those who received any engagement incentives, participants, on average, received approximately two-thirds of potential program intake and engagement incentives during their first nine months (average of \$192 out of a potential \$320). Most participants had not yet earned an employment incentive by the ninth month after study enrollment. Coaches described incentives as important to encouraging engagement because they help cover costs for attending in-person meetings and other household expenses, but they did not perceive the incentives to be the reason participants engaged. Participants had varying impressions of the importance of incentives. During in-depth interviews with a small number of participants, some participants stated that they were financially helpful, some thought incentives motivated goal progress, and others said they did not motivate them to participate.

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

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## I. Introduction

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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, executive functioning skills, or executive 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: goal-directed persistence 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.

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 many 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* (see 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 personal and family well-being.

This report describes the design and implementation of one employment coaching intervention: MyGoals for Employment Success (MyGoals). Launched in early 2017, MyGoals aims to help participants set and achieve employment goals by following a systematic process that includes focusing on their self-regulation skills. The three-year program combines employment coaching with financial incentives to support the economic mobility of public housing assistance recipients who are unemployed or working less than 20 hours a month (Castells & Riccio, 2020).

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### 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!**<sup>TM</sup> in Jefferson County, Colorado. Goal4 It!<sup>TM</sup> 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>.

MDRC, a research organization, developed MyGoals as an experimental demonstration program with assistance from Arnold Ventures and other funders.<sup>1</sup> Specifically, MDRC led the design of the model, designed the random assignment procedures, distributes funds for operating the program in two cities, and provides ongoing implementation guidance. Dedicated units within public housing authorities in Baltimore and Houston operated the program. The demonstration's program operations phase will last long enough to provide all participants with a three-year intervention, ending in September 2022 in both locations. MDRC was not involved in data collection, data analysis, or determining conclusions for the implementation study.<sup>2</sup>

## EMPLOYMENT COACHING

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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 not directive—the coach does not tell participants what to do; (3) is individualized; (4) helps participants learn the skills to set goals on their own and work toward meeting those goals; (5) attempts to reinforce participants' motivation to meet goals; and (6) holds participants accountable by regularly discussing with the participants their progress toward reaching goals. Employment coaching, for purposes of this study, is coaching in which goals are related directly or indirectly to employment.

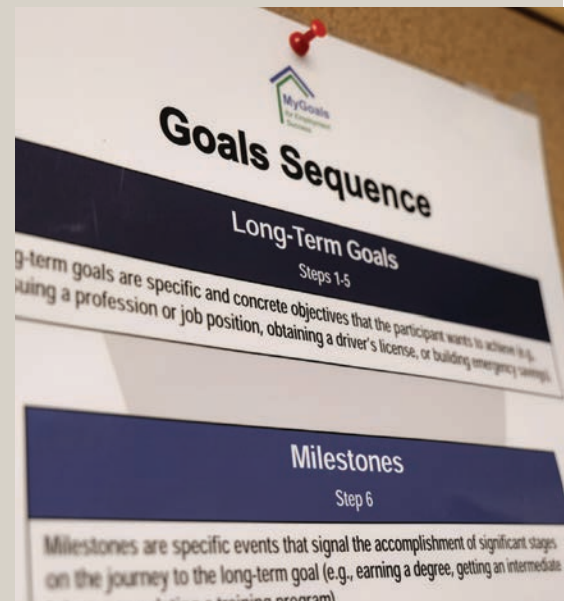
<sup>1</sup> Additional funders supported MyGoals in Houston and Baltimore: the Harry and Jeanette Weinberg Foundation, Houston Endowment, Inc., the Kresge Foundation, and the JPB Foundation. These organizations funded the implementation of MyGoals by the two housing authorities, the design and implementation of random assignment, the collection of public housing data, the provision of training and technical assistance on the evaluation and program, and some aspects of the impact analysis and reporting.

<sup>2</sup> MDRC was involved in the design, collection of administrative data, and data analysis for the impact study. Mathematica will conduct the primary impact analyses with input from MDRC.

**MyGoals materials describe the coaching program.**



(Photo: Rich Clement, Mathematica)



Employment coaching helps participants practice self-regulation skills needed to find, keep, and advance in a job, and use them after leaving the program.

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 & McConnell, 2019).

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

## DATA COLLECTION AND SOURCES

MDRC launched MyGoals in early 2017. Program enrollment occurred in two cohorts at both locations. The first cohort enrolled between February 2017 and February 2018, and the second enrolled between October 2018 and September 2019.

The primary data sources for this report are:

- In-person interviews with 13 MyGoals staff and coaching observations during site visits to Houston and Baltimore in April 2019, when the first cohort in both cities was about two years into the demonstration and recruitment for the second cohort was underway, with additional in-person interviews of staff and coaching observations in one Baltimore MyGoals office occurring in November 2019;

- 
- A staff survey of 13 coaches and supervisors (winter 2019);
  - Participant demographic, economic, and educational information from two sources: (1) a baseline information form completed when participants enrolled in the study (between February 2017 and September 2019), and (2) administrative data collected by the public housing authorities at the time the participants last certified for housing benefits prior to enrolling in MyGoals;
  - In-depth, in-person interviews with nine participants in Baltimore and 11 participants in Houston (spring 2019);
  - Video recordings of 14 coaching sessions in Baltimore and 15 coaching sessions in Houston (between May and July 2019);
  - Service receipt data from the MyGoals service tracking system (from February 2017 through December 2020). We focus on the first nine months after study enrollment as these data were available for all study participants at the time of analysis.
  - Telephone discussions with three program designers (spring 2019) and seven additional technical assistance providers from MDRC (October 2018 to January 2021);
  - Reviews of documents, such as policy and procedure manuals, training manuals, curricula, participant enrollment forms, assessment forms, and forms used to document coaching sessions and other activities; and
  - Secondary data on local economic conditions.

Because MyGoals is a demonstration program, it continues to evolve. Data collected for this report describes implementation at one point in time, about two years after participant recruitment and enrollment began. However, staff in both locations continued to hone their coaching practices through ongoing training and technical assistance provided by the demonstration developers.

## **ORGANIZATION OF THIS REPORT**

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Section 2 of this report explains the MyGoals program model and the context in which it operates. Section 3 describes the MyGoals participants. Section 4 describes the MyGoals 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 MyGoals-specific part of the study. Appendix B includes detailed tables describing participants' characteristics, coach characteristics, and participant engagement in the program.



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## II. The MyGoals Demonstration Model

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MyGoals aims to help recipients of housing assistance in Baltimore and Houston (1) obtain and retain employment and (2) ultimately make progress toward self-sufficiency.

Through a program of structured coaching with financial incentives, MyGoals aims to help recipients of housing assistance in Baltimore and Houston (1) obtain and retain employment and (2) ultimately make progress toward self-sufficiency. To be eligible for MyGoals, potential participants must be an adult member of a household receiving federal housing assistance (through a housing choice voucher or living in public housing) and be either unemployed or working fewer than 20 hours per month. Potential participants also must demonstrate that they are legally able to work in the United States and must not be participating in the Jobs Plus or Family Self-Sufficiency Programs, which also provide employment support to housing assistance recipients.<sup>3</sup> The three-year program is voluntary. Participants can continue to participate even if they stop receiving housing assistance.

### ORIGIN OF MYGOALS

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MDRC designed MyGoals in collaboration with neuropsychologist Richard Guare, an expert in learning and attention disorders who has studied the effects of poverty and chronic stress on the development of self-regulation skills. In addition to drawing on the evidence base described above, MDRC and Dr. Guare applied research from the Harvard University Center on the Developing Child documenting the long-term effects of poverty-related trauma in early childhood (see Castells & Riccio, 2020 for a review). They based MyGoals, in part, on an earlier coaching model that supported at-risk youth and adults with neurodevelopmental disorders and that Dr. Guare developed with Peg Dawson, a psychologist specializing in executive skills in children and adults with learning and attention disorders (Dawson & Guare, 2012). MDRC also considered studies of existing workforce programs that incorporate employment guidance and financial incentives. For example, an evaluation of the Family Self-Sufficiency program (see Verma, Yang, Nuñez, & Long, 2017), which offered job search assistance and case management in conjunction with financial incentives for increases in earnings, found that, for participants not working at the start of the program, incentives led to higher earnings over time.

MyGoals aimed to help adults coping with the stress of poverty in general, and the designers did not design the program specifically for recipients of public housing assistance; pre-existing partnerships with public housing authorities and funders in Baltimore and Houston supported the launch of MyGoals in those settings.

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<sup>3</sup> These programs, funded by the U.S. Department of Housing and Urban Development, offer job placement assistance, financial incentives, and coaching to public housing residents and housing choice voucher participants in Houston and Baltimore. The evaluation was designed to compare MyGoals to other services in the community and not to similar services provided by the housing authorities. Hence, households already receiving these other housing authority services could not participate in MyGoals.

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## THE KEY ELEMENTS OF MYGOALS

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As designed, MyGoals comprises the following key elements:

- **A long-term coaching relationship.** MyGoals consists of an initial coaching session followed by at least monthly coaching sessions between participants and their assigned coach for up to three years. The long-term, nondirective, participant-driven approach is meant to foster a deep and trusting relationship. The longer timeframe also allows for participants to hone their ability to set, work toward, and achieve goals and to learn strategies for goal-setting. Over time, the role of the coach is meant to fade as participants take the lead in planning and implementing their own action steps.
- **Explicit focus on executive skills.** The program focuses on 12 self-regulation skills that facilitate goal-setting and goal attainment (Box 2). MyGoals refers to these as executive skills (rather than self-regulation or executive functioning skills) and introduces them to participants early in the coaching process. Coaches also receive training on these skills and their importance to goal setting and achievement as part of the technical assistance provided by program designers (Castells & Riccio, 2020).

The program focuses on 12 self-regulation skills that facilitate goal-setting and goal attainment.

### Box 2. Executive Skills Definitions

- **Response Inhibition:** The capacity to think before acting and resisting the urge to say or do something before taking the time to evaluate a situation and how one's behavior might impact it.
- **Working Memory:** The ability to hold information in memory while performing complex tasks. It incorporates the ability to draw on past learning or experience to apply to the situation at hand or to project into the future.
- **Emotional Control:** The ability to manage emotions to achieve goals, complete tasks, or control and direct behavior.
- **Task Initiation:** The ability to begin projects without undue procrastination, in an efficient or timely fashion.
- **Sustained Attention:** The capacity to maintain attention to a situation or task in spite of distractibility, fatigue, or boredom.
- **Planning/Prioritization:** The ability to create a road map to reach a goal or to complete a task. It also involves being able to make decisions about what is important to focus on and what is not important.
- **Organization:** The ability to create and maintain systems to keep track of information or materials.
- **Time Management:** The capacity to estimate how much time one has, how to allocate it, and how to stay within time limits and deadlines. It also involves a sense that time is important.
- **Goal-Directed Persistence:** The capacity to have a goal, follow through to the completion of that goal, and not be put off or distracted by competing interests.
- **Flexibility:** The ability to revise plans in the face of obstacles, setbacks, new information, or mistakes. It relates to an adaptability to changing conditions.
- **Metacognition:** The ability to stand back and take a bird's eye view of oneself in a situation, to observe how one solves problems. It also includes self-monitoring and self-evaluative skills (for example, asking oneself "How am I doing?" or "How did I do?").
- **Stress Tolerance:** The ability to work in stressful situations and to cope with uncertainty, change, and performance demands.

Source: Guare, Dawson, & Guare (2017).

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- **Addressing executive skills challenges.** MyGoals participants complete an Executive Skills Questionnaire (ESQ) when they begin the program and then coaches and participants refer to the ESQ to identify executive skill strengths and challenges in participants' daily lives. Coaches also support participants by sharing strategies to manage executive skills challenges that get in the way of their success. Examples of these strategies include: environment modifications (changing the environment or the task to accommodate a particular executive skill challenge), cognitive rehearsals (visualizing the completion of a task and mentally walking through potential obstacles), and situational incentives (rewards that participants decide they will give themselves once they complete a task). Participants and coaches reassess and work on specific executive skills strengths and challenges as the coaching relationship (and trust) evolves.
  - **A focus on multiple domains to promote economic advancement.** To support the ultimate goal of economic advancement, participants focus on goal setting in four interlocking domains (MDRC, 2017): (1) Employment and Career Development (the primary focus); (2) Education and Training; (3) Financial Management; and (4) Personal and Family Well-Being (e.g., participants' physical and mental health, their family members' health, and other family circumstances).
  - **A structured coaching process with a set of coaching tools.** MyGoals has a defined structure with steps that are intended to guide participants through a nested hierarchy of goal types starting from broad ideas to specific supporting activities (Box 3). The four goal types are:
    1. Long-term goals that are specific and have concrete objectives that a participant wants to achieve in two or three years;
    2. Milestones that are specific markers to set in order to accomplish a long-term goal (with multiple milestones per long-term goal) and take a few months to a year to accomplish;
    3. SMART (Specific, Measurable, Attainable, Realistic and Relevant, and Timely) goals that are smaller steps needed to reach milestones (with multiple SMART goals per milestone) that take two to four weeks to accomplish, and
    4. Action steps that are the smallest steps to complete a SMART goal and are designed to take one to two weeks to accomplish (Castells & Riccio, 2020).

Coaches are trained to adapt the process based on individual situations and are supported by tools that coaches and participants can use together (Box 3). Coaching sessions ideally become shorter or less frequent as participants rely less on coaching to achieve their goals over time.

### Box 3. MyGoals Steps and Related Tools

Steps	Related Tools
1. Get Acquainted: establish rapport and collect background information	<b>Getting to Know You Questionnaire (mandatory during first session):</b> A 24-question survey intended to guide a discussion between coaches and participants during the first coaching session about the participants' interests, education and employment backgrounds, strengths, and qualifications.
2. Set a Long-Term Goal: review interests and strengths with an aim toward identifying a potential long-term goal	<b>Executive Skills Questionnaire (ESQ) (mandatory during first session):</b> A 36-item form with three declarative statements per each of the 12 executive skills. Respondents rank their level of agreement with each statement (from 1 to 6), and then sum their responses to identify their top three skills (the three highest scores) and their top three challenges (the three lowest scores). The ESQ is not a diagnostic tool; it is intended to introduce participants to the concept of executive skills and begin an ongoing discussion of how addressing certain executive skills may help participants attain their goals.
3. Discuss Prerequisites: identify conditions that must be met to move forward	<b>Prerequisite checklist:</b> A checklist of essentials that need to be in place (e.g., stable housing, reliable childcare) for participants to move toward meeting their goals. The form also includes a place for coaches to document executive skills for which the participant may need extra support.
4. Assess Goodness of Fit: discuss current starting point and what it will take to reach the goal	<b>Goodness of Fit Profile I and II:</b> Two short forms where coaches document discussions with participants about the fit of their long-term goal with (I) their preferences, experiences, and executive skills profile and (II) potential obstacles to reaching the goal.
5. Identify Obstacles: explore prerequisites that cannot be met or worked around	
6. Review/Revise Long-Term Goal: firm up or revise goal based on steps 2-5	<b>Goal setting forms:</b> A set of forms coaches and participants can use to document long-term goals, prerequisites, and milestones that need to be achieved to meet the long-term goal, SMART goals that map to achieving specific milestones, and action steps that match to specific SMART goals. In addition to the forms listed here, Houston coaches sometimes use an in-house notetaking form to organize their coaching session notes by topic. It includes a place to record participant progress on goals in each of the four domains, prompts, the list of executive skills, and focus questions to help participants identify SMART goals.
7. Set Milestones: identify events that signal accomplishment of a significant stage in reaching the goal	
8. Set SMART Goals: convert milestones to a series of specific, measurable goals	<b>Strategies form:</b> A checklist of potential executive skills strategies participants can choose from to improve goal achievement, including ideas for pushing through obstacles by modifying their environment (i.e., changing the physical or social environment, modifying the task, or enlisting help from others), identifying short-term motivational incentives, and practicing a skill that needs improvement through cognitive rehearsals.
9. Set Action Steps: map out daily or weekly SMART goal components	
10. Discuss Strategies for Goal Completion: choose techniques that are likely to increase the likelihood for completing action steps and goals	
11. Review and Assess Action Plan: each session, review progress since the last plan and update techniques, goals, and action plan as needed	
12. Fade Coaching: discuss timing and approach for gradually reducing the role of the coach as participants successfully engage in the goal-setting process	

Source: Castells & Riccio (2020); Guare, Dawson, & Guare (2017)

- **Financial incentives for participants.** MyGoals participants are eligible for financial incentive payments that are tied to initial engagement in the program, continued engagement (e.g., attending monthly coaching sessions), obtaining or increasing employment, and employment retention (Exhibit 1). Participants can earn a maximum incentive of \$5,000 during their time in the program.

**Exhibit 1.  
MyGoals  
Incentive  
Structure**

Category	Type of Bonus	Amount
Program Intake	Getting Started	\$50
Engagement	Monthly Engagement ( <i>each month for first two years</i> )	\$30
	Becoming Employed Part-time ( <i>available once per participant</i> )	\$70
Employment	Becoming Employed Full-time ( <i>available once per participant</i> )	\$150
	Staying Employed Three Months in a Row ( <i>per three-month period, available up to two times per participant, for a total of up to \$900</i> )	\$450
	Staying Employed Six Months in a Row ( <i>after receiving both three-month bonuses, no limit on availability per participant up to a maximum total incentive amount of \$5,000 per participant</i> )	\$900

Source: MyGoals Participant Manual

- **Other program resources.** Supports include referrals to a range of other local resources including employment services at American Job Centers, mental health services, libraries, donation centers, and substance use disorder services as needed. In addition, coaches provided local labor market information obtained through the New York City Labor Market Information Service (NYCLMIS), a consulting unit of the Center for Urban Research at the Graduate Center at The City University of New York. Specific resources include two-page handouts that participants use to learn about careers and labor market information specific to the participants' interests and locale (Baltimore or Houston). The handouts suggest key words, employers, and websites to improve an online job search and provide a summary of prerequisites (skills, education, and prior experience) that job applicants should highlight in their job application. Coaches request quarterly updates from NYCLMIS.
- **Coaching training and technical assistance, with a built-in feedback loop.** MyGoals was designed to be implemented by mid-career case management staff who had experience working directly with participants, especially in a social service environment, but who did not necessarily have any previous experience in coaching. As a demonstration, the program designers planned to support coaches as they learned the complex MyGoals model by providing technical assistance and training and remaining accessible to staff when challenges arose. Coaching staff were encouraged to provide feedback on what was (and was not) working well as they implemented the model.

**Two MyGoals coaches talk by a MyGoals banner.**



(Photo: Rich Clement, Mathematica)

## **PROGRAM CONTEXT**

The housing authorities in Baltimore and Houston—which provide both subsidized housing and housing choice vouchers—operate MyGoals and provide referrals to the program. MyGoals coaches also conducted outreach at other community locations, such as job fairs, libraries, and TANF offices. In Baltimore, the MyGoals offices are adjacent to two public housing developments managed by the Housing Authority of Baltimore City (HABC). The offices are located in a community center across the street from the Cherry Hill Homes and in an HABC resident services office next to the Latrobe Homes. MyGoals coaches also held recruiting events at other public housing developments, including McCulloh Homes and Perkins Homes, both in the vicinity of Latrobe Homes. About half of My Goals participants in Baltimore lived in public housing developments and half received housing choice vouchers. In Houston, the MyGoals program is located at the central office of the Houston Housing Authority (HHA), where public housing and housing choice voucher recipients from all over the city go to apply for, request changes to, or recertify their housing benefits. Nearly all MyGoals participants in Houston received housing choice vouchers and came from a broad range of neighborhoods.

While there are demographic differences between the cities of Houston and Baltimore, nearly all heads of household in subsidized housing programs in both cities report as Black, non-Hispanic individuals (95 percent in Baltimore and 87 percent in Houston).<sup>4</sup>

Coaches in both cities reported that participants faced personal and logistical challenges to obtaining employment, though there were some differences.

<sup>4</sup> U.S. Department of Housing and Urban Development, Picture of Subsidized Households 2019, [https://www.huduser.gov/PORTAL/datasets/assthsg.html#2009-2019\\_data](https://www.huduser.gov/PORTAL/datasets/assthsg.html#2009-2019_data)

**A poster describes the housing authority's commitment to community, customer service, collaboration, and communication.**



(Photo: Rich Clement, Mathematica)

Houston coaches reported that transportation is a major challenge for participants to access jobs and attend coaching sessions. Houston is a sprawling city without efficient public transportation, often requiring multiple bus transfers to get from one point to another. In video observations of coaching sessions, Houston participants most commonly discussed child care, housing instability, physical health, and legal issues as challenges to employment.

When asked about challenges for participants, coaches in Baltimore described a lack of mobility between the city neighborhoods, especially those near the MyGoals Cherry Hill program office. Although they could access the MyGoals office in their neighborhood, it was challenging for participants to seek work or access other services in other parts of or just outside the city. Coaches pointed to limited or cumbersome public transportation as a contributing factor. In particular, coaches pointed to recent changes to the city's public transportation system, specifically to the bus routes, that made it more challenging for residents to get to Baltimore County (where more jobs and training programs are located). Coaches also described a reluctance among participants to cross neighborhood boundaries in general. When asked about the nature or origins of this reluctance, even coaches who grew up in the same neighborhoods did not know why, only that it was longstanding. Relatedly, one Baltimore coach said she routinely asks participants about the distance they are comfortable traveling for a job or to access services early in the coaching relationship, and that some participants create an action step for themselves to ride the bus to the other side of town to get used to the idea of cross-neighborhood travel. An additional challenge some Baltimore participants reported during in-depth interviews was personal experience with violence, crime, and addiction in their communities and among their family members. In contrast, Houston participants did not report experiencing community violence during in-depth interviews, but some reported personal experience with domestic violence or having incarcerated family members.

The Houston and Baltimore economies differ. The Houston economy is largely supported by the oil industry and most jobs are in the “trade, transportation and utilities” sector<sup>5</sup>, though coaches reported that many participants find employment in healthcare (e.g.,

<sup>5</sup> U.S. Bureau of Labor Statistics, [https://www.bls.gov/regions/southwest/summary/blssummary\\_houston.pdf](https://www.bls.gov/regions/southwest/summary/blssummary_houston.pdf)

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Certified Nursing Assistants, phlebotomists), manufacturing, retail, and transportation. The Baltimore economy is anchored by large universities and research hospitals (Johns Hopkins University is the biggest employer in the city). Accordingly, the largest industry in Baltimore is “education and health services,”<sup>6</sup> and coaches reported high demand for Certified Nursing Assistants and opportunities for healthcare-related training. Coaches also mentioned that there is sustained demand for drivers with a commercial driver’s license, with scarce job training opportunities for jobs that are not healthcare- or driving-related.

In both cities, employment rates and earnings are vastly different for Black and white residents. Twice as many Black residents as white residents have incomes below the poverty level, and the unemployment rate among Black job seekers is approximately twice that of white job seekers.<sup>7</sup> This has been a historical, persistent trend in both cities.<sup>8</sup>

MyGoals participants in both cities can access (and are referred to) additional services. Employment services are available through American Job Centers and several local non-profit organizations. Coaches in Houston and Baltimore maintain a list of community resources to address mental health, physical health, and substance use disorders, as well as for clothing, food, and other necessities. The availability of resources varies within cities. For instance, in Baltimore, Latrobe Homes is close to downtown and a variety of resources. Cherry Hill, on the other hand, is more isolated. In Houston, participants live in a variety of neighborhoods, so the resource list includes agencies in many parts of the city. Staff note that participants face challenges to accessing services. For example, mental health service providers in areas accessible to participants might not have open slots.

The data collection for this study occurred prior to the onset of the 2019 novel coronavirus disease (COVID-19) pandemic. As a result of COVID-19, in spring 2020 the program made some changes to how it was operated (Box 4).

#### **Box 4. MyGoals Implementation During COVID-19**

On March 13, 2020, all MyGoals Baltimore coaching services moved from in-person meetings with a virtual option to only virtual meetings, in response to state lockdowns due to COVID-19. MyGoals Houston made the same transition on March 16, 2020. MyGoals’ prior experience with phone or virtual coaching sessions helped aid the transition. At both locations, all staff began working from home and providing virtual coaching sessions, only going into the office a day or two a week to use office equipment such as scanners and printers or to process MyGoals incentive payments. As of November 2021, coaching sessions remained completely virtual in Houston, mostly conducted through phone calls and sometimes through video. In Baltimore, in-person coaching sessions were available by appointment only.

MyGoals made two policy changes during the pandemic. First, the program allowed participants to continue to meet with coaches through January 2021, even if they had already received three years of MyGoals services. These participants were eligible to receive the monthly engagement incentives but not the employment incentives after their third anniversary. Second, the program reconfigured the incentive structure so that participants who had been laid off because of the pandemic would not lose employment incentives they would have otherwise received. For example, if a participant had been employed for two months but laid off due to the pandemic, he or she could still receive the three-month incentive.

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<sup>6</sup> U.S. Bureau of Labor Statistics, [https://www.bls.gov/regions/mid-atlantic/summary/blssummary\\_baltimore.pdf](https://www.bls.gov/regions/mid-atlantic/summary/blssummary_baltimore.pdf)

<sup>7</sup> U.S. Census Bureau, Quick Facts, 2019 American Community Survey 1-Year Estimates, Tables S2301 & S1701 (Harris County, TX and Baltimore City, MD).

<sup>8</sup> Ibid.



### III. MyGoals Participants

Nearly all MyGoals participants report as Black, non-Hispanic (Exhibit 2). (Appendix Table B.1 includes more information on participant characteristics.) Most report as female (89 percent in Houston and 86 percent in Baltimore). According to housing authority records, a substantial minority of participants have a disability, as defined by the U.S. Department of Housing and Urban Development (30 percent in Baltimore and 19 percent in Houston). More than 20 percent of participants had not completed a high school diploma or a General Education Development (GED) program according to their most recent housing recertification prior to study enrollment.

#### Exhibit 2. MyGoals Participant Baseline Characteristics

	Baltimore	Houston
<b>Demographics</b>		
Average age (years)	38	37
Female (percentage)	86	89
Race and ethnicity (percentage)		
Hispanic	<1	4
Black, non-Hispanic	97	94
White, non-Hispanic	2	2
Other	1	<1
Person with disability (percentage)	30	19
<b>Socioeconomic status at time of most recent recertification for housing benefits prior to study enrollment</b>		
Was receiving any income from Temporary Assistance for Needy Families (percentage)	24	2
Was receiving any income from Social Security benefits (percentage)	26	14
Was receiving any income from wages (percentage)	16	9
Average annual income from wages, for respondents with any wage income (dollars)	14,866	13,764
<b>Employment and education status and history at study enrollment</b>		
Not employed at the time of study enrollment (percentage)	98	99
Average number of months employed in the 12 months prior to study enrollment (months)	2	3
Did not have high school diploma or GED credential at study enrollment (percentage)	27	22

Source: Gender, race, disability status, and socioeconomic status come from Public Housing Authority data collected at the last recertification for housing benefits before enrolling in the study. Age, employment status and history, and education at study enrollment come from the MyGoals baseline form. Includes study participants in the Baltimore group (n=376) and Houston group (n=528).

Note: Missing data rates ranged between 0 percent and 8 percent. Public housing data are missing for 40 Houston participants, and those participants are omitted from the measures that are calculated using those data.

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Per MyGoals eligibility criteria, all participants were unemployed or working less than 20 hours at the time of study enrollment. As Exhibit 2 shows, only 1-2 percent of participants were employed at all when they entered the study. Participants reported working two to three months on average the year prior to study enrollment. Only 15 percent of Baltimore participants and 9 percent of Houston participants reported having income from wages at their most recent housing assistance recertification. Among the small number of those with earned income, reported annual wages were low—averaging \$14,900 in Baltimore and \$13,800 in Houston. For comparison, this is slightly higher than the poverty threshold for a single adult, but less than the poverty threshold for larger households.<sup>9</sup> Participation in TANF or Social Security benefit programs was uncommon, especially in Houston.

**A MyGoals coach  
listens to a  
participant.**



(Photo: Rich Clement, Mathematica)

<sup>9</sup> Thresholds for all household sizes in 2018 are available through the U.S. Census Bureau website: <https://www2.census.gov/programs-surveys/cps/tables/time-series/historical-poverty-thresholds/thresh18.xls>.

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## IV. MyGoals in Practice

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MyGoals implementation evolved over time in response to ongoing communication between program designers and coaches. As coaches described challenges implementing some aspects of the program, designers made modifications or clarified processes.

**The complex MyGoals coaching model was challenging for coaches to master immediately; additional training and technical assistance were needed for coaches to understand the model's flexibility.**

Coaches reported that the MyGoals 12-step coaching process generally is valuable and helps participants learn to set and achieve goals. However, they also reported challenges implementing the process and applying the hierarchy of goal types. During site visit interviews, coaches mentioned (and supervisors confirmed) that they sometimes get mired in the order of the steps, especially when the order of the steps did not align with the participant's current situation. They noted that some participants were not ready to set a long-term goal early in the coaching relationship, which is one of the first two steps in the coaching process (Box 3, above). For example, some participants needed to address an immediate crisis (e.g., a health issue, domestic violence), while others needed time to explore their interests and skills before identifying a long-term goal. In these situations, participants preferred to focus on shorter-term goals and action steps.

Coaches also reported challenges working with participants to identify the four goal types (long-term goals, milestones, SMART goals, and action steps). Some coaches described the hierarchy of goal types as “clunky,” and one supervisor noted that some coaches are unclear how to differentiate milestones from long-term goals. For example, coaches discussed situations when a participant might set a SMART goal and then determine the identified long-term goal is not realistic and return to an earlier step. Other times, participants might decide a milestone should in fact be a long-term goal.

### Box 5. MyGoals Implementation Key Takeaways

1. The complex MyGoals coaching model was challenging for coaches to master immediately; coaches needed additional training to understand the model's flexibility.
2. Coaches reported the coaching tools were helpful and their use varied across sessions.
3. As designed, coaches discussed executive skills explicitly with participants.
4. Coaches focused on developing strong and trusting relationships with participants; many participants reported positive relationships with their coaches.
5. While coaches generally were nondirective (that is, they did not tell participants what to do), some struggled with this aspect of coaching.
6. MyGoals coaches' qualifications and the training they received from program designers contributed to their ability to learn and implement the complex model.
7. Participants and coaches had monthly contact, as planned; by month nine, about two-thirds of participants were still participating in the program.
8. Coaches and participants had mixed perceptions regarding the value of incentives.
9. Participants reported receipt of referrals and other supports, but some indicated more direct employment assistance would also be helpful.

In response to this feedback from coaches, program designers clarified—in additional training and technical assistance—that the coaching process need not be linear and should be driven by the participant’s situation. Thus, if participants are not ready to set a long-term goal, coaches should work with them to set milestones, SMART goals, or even action steps as a way to build confidence and determine their interests.

Goal-setting patterns reflect this flexibility. As Exhibit 3 shows, in the first nine months after enrollment, participants in both cities set SMART goals most often (63 percent in Baltimore and 78 percent in Houston). Over half of participants set long-term goals (54 percent and 61 percent in Baltimore and Houston, respectively). Milestones—the step between SMART goals and long-term goals—were least common among participants in both cities, reflecting the flexibility afforded to coaches and participants. Approximately half of participants set action steps, which, as noted earlier, are intended to have the shortest timeframe for completion. In the first nine months after enrollment, according to the MyGoals service tracking system and as reported by participants to their coaches, Baltimore participants completed 29 percent of their action steps, while Houston participants completed 55 percent (Exhibit 3).

Aligning with the design of the program, participants set goals in all four domains, with employment and career management the most common focus in both Baltimore and Houston (Exhibit 3). Education and training was the second most common focus in both cities, followed by personal and family well-being, and lastly financial management.

### Exhibit 3. Goal Setting in First Nine Months

Goal setting	Baltimore	Houston
<b>Percentage of participants who set a goal (long-term goal, milestone, SMART goal, or action step)</b>		
Any goal (long-term goal, milestone, SMART goal, or action step)	69.6	79.5
Percentage of participants who set a long-term goal	53.8	60.5
Percentage of participants who set a milestone	38.2	54.9
Percentage of participants who set a SMART goal	63.0	78.4
Percentage of participants who set an action step	57.1	58.3
Percentage of action steps participants completed, among those participants who set an action step	28.6	55.1
<b>Percentage of participants who set a goal (long-term goal, milestone, SMART goal, or action step) by domain</b>		
Employment and career management	54.6	50.3
Education and training	40.5	7.9
Financial management	13.6	4.6
Personal and family well-being	23.8	3.6

Source: Staff records from the MyGoals service tracking system for the Baltimore group (n=373) and the Houston group (n=527).

Note: Sample size reflects one Houston participant who withdrew from the study.

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**Coaches reported that the coaching tools were helpful and that their use differed between the initial session and subsequent sessions.**

Overall, coaches reported the MyGoals tools were helpful in executing the key components of the model, particularly in initial sessions. A typical first coaching session included a review of the manual that participants receive upon enrollment and completion of the Getting to Know You Questionnaire and the ESQ. Staff survey results indicate that 90 percent of coaches surveyed thought the ESQ and Getting to Know You Questionnaire were either “valuable” or “extremely valuable,” and no coaches reported they were “rarely valuable” or “not valuable.”

In subsequent sessions, coaches reported using tools less frequently. According to coaches, these sessions typically begin with a check-in on previously agreed-upon action steps, followed by a discussion of modifications to or new action steps, and then (if relevant) setting new goals, sometimes using a goal planning form. When participants are exploring employment goals, coaches share up-to-date information from updates provided through the NYCLMIS on the local labor market (including demand, average pay, and typical prerequisites for various jobs). The sessions close by setting the next meeting date and reviewing what participants are planning to do before then. Analysis of video recordings found coaches in Houston used tools (like goal planning forms) with participants in almost all recorded sessions, while coaches in Baltimore used them infrequently. The Baltimore office had recently experienced staff turnover among both coaches and the coaching supervisor just prior to making the video recordings; it is possible that the use of tools during sessions increased with additional training.

**Per the MyGoals design, coaches discussed executive skills explicitly with participants.**

A hallmark of MyGoals is the explicit focus on participants’ executive skills (Box 2, above). Coaches described a variety of ways in which they incorporate participants’ executive skills into sessions.

As designed, participants complete the ESQ during their initial coaching session, and coaches use the results in subsequent discussions about goal setting. Coaches reported they often find revisiting the participants’ responses throughout the coaching relationship helpful, as participants learn more about their skills through practicing goal setting over time. Some coaches discussed executive skills over multiple sessions. One reported that she did not want to overwhelm participants with all the information at once and another picked a skill each month to discuss with all participants.

Coaches reported that referring to executive skills during monthly sessions helps participants identify and practice “workarounds” for challenging areas. For example, if a participant identified working memory challenges, the coach and participant might discuss how note-taking could help address that barrier to goal attainment. Also, if participants have difficulty with task initiation, they could set a timer to stay focused (see Box 6 for an example). During an in-depth interview, a participant discussed how her coach helped her by teaching breathing techniques to use in stressful situations (an example of a strategy to improve response inhibition and emotional control).

A hallmark of MyGoals is the explicit focus on participants’ executive skills.

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Participants mentioned specific skills they were working on including motivational skills, patience, time management, organization, and anger management (see Box 7 for an example).

One coach described integrating discussions of executive skills during check-ins and when participants met challenges:

*You can call me for a listening ear, to offer advice and support. The program gives us that opportunity because it's tied into executive skills—you're having problems controlling your emotional control. Let's talk about that so that when it happens again you'll know what to do. [The] program gives us opportunity to point out executive skills. (Houston Site Visit Interview)*

Another coach made a point to phrase affirmations in terms of an executive skill:

*You are showing that you are good at prioritizing. You completed that goal, let's make another plan. I see you are great at planning. You are great at task initiation.*

*You're planning, you're prioritizing, that's one of the ESQs of time management... that's excellent. (Baltimore Video Observation)*

#### **Box 6. Example of Implementing a "Workaround" to Address Executive Skills Challenges**

To support Susan (not her real name) in keeping her new job, Susan's coach brought up some of the executive skills Susan had previously identified as challenges, including task initiation and flexibility. Susan shared that for the past few months she has been timing herself completing tasks on a stopwatch; Susan knows she has been procrastinating if she hasn't finished a task before the clock stops. Susan emphasized how hard she has been working to improve these skills and said that the majority of the time she is able to remain focused and complete tasks before the time is up.

Source: Houston Video Observation

#### **Box 7. Example of Explicit Discussion of Executive Skills**

After a participant talks about her progress on her goals, the coach says, "We've been working together for the past two years to get to this point, it has been hard...but you've been really persistent about your goal, and when I review your record...you are very determined. Goal directed persistence was one of your executive function skills that I told you, you were very strong in. Because you told me that you wanted to be a phlebotomist and in your current role, you're actually working as a phlebotomist...this is your long-term goal. So I want to make sure you can maintain this, so let's talk about some of your executive skills weaknesses that you identified initially. Let's talk about how they are coming into play." The coach goes into a discussion of some of the participant's challenges, like flexibility. When faced with logistical and transportation challenges to getting to work on time, the coach asks, "What do you see your options are?" The participant responds, "See what the manager says. If he can't help me, I have the option to get up earlier. I'm not gonna quit. But if I'm getting no hours, I'll need to leave." The coach suggests doing some planning around the options presented. "You have skills that employers are looking for, you're highly marketable. Hopefully [the manager] will work something out...you can look for another job. We can set as a goal looking for a new job, even while working."

Source: Houston Video Observation

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**Coaches focused on developing strong and trusting relationships with participants; many participants reported positive relationships with their coaches.**

Coaches noted the importance of developing rapport from the very first meeting to help participants feel comfortable enough to discuss their goals and share challenges that might keep them from reaching their goals. During site visits, coaches commented on the ways in which the coach-participant relationship can affect the quality of their coaching, as well as participants' success in setting and achieving goals. One coach mentioned that some participants do not discuss personal issues (e.g., personal safety, substance use disorder, mental health conditions) that might affect their ability to pursue employment and other goals until they attain a level of trust with their coach. Coaches described various reasons it can take time to develop a trusting relationship, including negative past relationship experiences where trust was broken, and a long-standing distrust of research. (Participants learn about the research component of MyGoals during the orientation for potential participants.)

Being authentic and honest with participants is important to building strong coaching relationships.

Coaches also commented that being authentic and honest with participants is important to building strong coaching relationships. Coaches and participants alike mentioned that coaches' sharing of stories and experiences helps build rapport. One coach commented that participants can tell when someone is "being fake" and will not open up to their coach if they do not sense genuine interest. During site visits in both cities, some coaches commented that having grown up in the same neighborhood as participants—and having faced similar circumstances such as safety issues, lack of employment opportunities, and geographic isolation—helps build trust.

During in-depth interviews, participants described strong, positive relationships with their coaches (Box 8). Most reported that they connected with their coach on a personal level, and several noted their coach had their best interests in mind. Participants also described coaches as "loving and caring," "uplifting," "helpful," "good listeners," and "non-judgmental." Some participants described their coaches as "religious" or "spiritual," which helped them connect with their coach. And, a few participants described their relationships as being more "professional," like a student-teacher or client-therapist relationship. Several participants described their coach's relationship to them as akin to a "mother," "aunt," "big sister," or "like a friendship."

*She's more like an aunt. I can talk to her without feeling like this is someone I don't know. She feels very...like I've been knowing her for years. (Houston In-depth Participant Interview)*

**Box 8. Example of a Positive Coaching Relationship**

Nathan (not his real name) believes that the resources and advice his coach offers him have been instrumental in his progress toward reentering the workforce. He and his coach communicate as needed in between their monthly in-person meetings through phone calls, text messages, and emails. He compares his coach to a "spotter at the gym"—someone who holds him accountable and supports him in achieving the goals he sets for himself. Nathan describes his coach as someone who wants him to do better. He says that he feels like his coach is genuinely supportive of his goals and wellbeing.

Source: Houston In-depth Interview

A poster explains workers' compensation.



(Photo: Rich Clement, Mathematica)

**While coaches generally were nondirective (that is, they did not tell participants what to do), some struggled with this aspect of coaching.**

Coaches noted that remaining nondirective is central to the coach-participant relationship but acknowledged that it is a skill that takes time to learn; this is particularly true when coaches have knowledge and resources they want to share. One coach commented on the importance of finding the right balance so that participants remain in control of the discussion:

*Rapport is everything. If you tell them they're in charge and then try to direct, [you] could lose rapport. Be very careful about suggesting resources. (Baltimore Site Visit Interview)*

Analysis of the recorded coaching sessions indicates that the coaches generally were nondirective in their interactions with participants but were—at times—directive at some point during the session. MyGoals Houston coaches directed the participant at some point in 7 of the 15 recorded sessions; the Baltimore coaches directed the participant at some point in 9 of 14 sessions.

Coaches described scenarios that make it more difficult to be nondirective, including when a participant is not making progress and the coach has ideas about next steps. In addition, some coaches have a background in case management and are used to providing directive guidance. One supervisor described how she trained coaches to be nondirective. One exercise she used focused on coaches feeling comfortable with silence when a participant is not engaging in the conversation. This is an example of coaches learning to improve their own response inhibition, one of the executive skills described in the ESQ.



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Coaches reported that some participants expected their coaches to be directive. This may stem from their experience with case management in other public assistance programs, in which participants are not expected to be proactive. For example, one coach reported:

*A lot of our clients have been part of the system and used to not doing something until someone tells them to do something. They have a mindset that the coach will tell them when to come in and what the consequence will be. We don't dictate what we're going to talk about, what you're gonna bring, and what you're gonna do. Not having that structure—me saying “can you come in this week?” “What day is good for you?” And they say “I don't know. Can you tell me what day is good for me?” (Houston Site Visit Interview)*

Nevertheless, participants reported during in-depth interviews an appreciation for the nondirective approach. Specifically, participants shared that MyGoals allowed them to work on goals they chose and at their own pace, that coaches are flexible and accommodating to life situations that might arise and disrupt activities, and that coaches were available to help them succeed and provide advice and guidance. One participant highlighted the nondirective nature of coaching as the best part of MyGoals:

*The absolute best thing about MyGoals is they don't force you to do anything that you don't want to do. They allowed you to make your own decisions and they don't—they're not strict. It's not strict. It's not rigid. To me, the main thing is they allow you to go at your own pace. Never mind you're in the program for three years, so at some point you need to pick up your pace. I'm picking up my pace now, because this year and next year, I need to pick up my pace in my last two years. (Baltimore In-depth Participant Interview)*

### **MyGoals coaches' qualifications and the training they received from program designers contributed to their ability to learn and implement the complex model.**

MyGoals job postings for coaching positions in both cities noted that the position required at least a bachelor's degree, with a preference (but not a requirement) for five to seven years of professional experience (especially in workforce development, adult education and career exploration, social welfare, financial management, Motivational Interviewing, and/or Cognitive Behavioral Therapy). As Exhibit 4 shows, all MyGoals coaches and coaching supervisors have at least a four-year college degree, and two have a graduate or professional degree. Most coaches also reported having some prior coaching experience, although not necessarily employment coaching. Coaches reported previous work experience in a range of areas, including substance abuse counseling, providing information and referrals for various social services through a call center, homeless services, and case management.

In general, coaches have higher education and more work experience than participants but are like participants in terms of demographics (e.g., most are female; most report as Black, Non-Hispanic; and they are, on average, in their early 40s).

## Exhibit 4. Coach Characteristics

	Number of Coaches
<b>Demographics</b>	
Average age (years)	43
Gender (number)	
Female	10
Male	1
Race and ethnicity (number)	
Hispanic	1
Black, non-Hispanic	9
White, non-Hispanic	1
<b>Highest level of education (number)</b>	
4-Year College Degree (Bachelor's Degree)	9
Graduate or Professional Degree (Master's Degree)	2
<b>Total work experience in coaching, including current and prior positions (number)</b>	
Less than 1 Year	0
1 Year to Less than 3 Years	1
3 to 5 Years	4
More than 5 Years	6

Source: Staff survey (included responses from coaches and coaching supervisors who had maintained a coaching caseload at some point; excluded responses from program directors who did not coach). (n=11). We do not present the characteristics of coaches separately by location because of the small sample sizes (n=4 in Baltimore and n=7 in Houston).

During site visits, coaches noted the importance of the initial training, as well as ongoing training and technical assistance, in learning the MyGoals model. Upon being hired, and usually prior to attending an intensive in-person training provided by the program designers, coaches completed pre-work that included a review of several program documents and resources: a description of the MyGoals demonstration, the participant orientation video, the participant manual, a program design paper entitled *Role of the Coach: Responsibilities of MyGoals Coaches Across the Program's Four Domains* (MDRC, 2017), and the *Executive Skills Coaching Manual* (Guare, Dawson, & Guare, 2017). Coaches also completed a 15-hour online Motivational Interviewing training class, the Getting to Know You Questionnaire, and the ESQ.

Program designers held in-person training events multiple times during the first year of the demonstration (November 2016 to July 2017) and again in October 2018. Program designers also facilitated a three-day learning exchange in October 2019. At all the in-person training sessions, which included coaches from both Houston and Baltimore, program designers presented information but also provided opportunities to practice applying coaching techniques in varying scenarios, and to discuss challenging cases. Coaches reported that the in-person training was valuable in helping them understand and implement the program.

In addition to the pre-work and in-person trainings, Dr. Guare and MDRC delivered topical trainings and provided ongoing technical assistance. Topical trainings, typically provided on conference calls and occasionally in person, focused on a particular aspect of program data collection (e.g., entering data, recording case notes) or a resource

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that may be valuable to participants (e.g., labor market information, credit training, information about the Earned Income Tax Credit). Then, during weekly technical assistance conference calls, coaches were invited to raise implementation challenges and work through resolutions, sometimes resulting in ad hoc training or clarifications of the coaching process. In addition, coaches in both cities participated in four case conference sessions each with Dr. Guare over the course of the demonstration in which they walked through particularly challenging cases and received guidance and support from the program designers, supervisors, and other coaches. In a more informal setting, coaches reported they consulted with other coaches and their supervisor for advice about specific cases. Box 9 summarizes the various types of training and technical assistance provided.

### Box 9. Types of Training and Technical Assistance for MyGoals Coaches

Since the beginning of the program, coaches and supervisors at both sites participated in **intensive training activities** with program designers:

- Five multi-day, in-person training events (November 2016, January 2017, March 2017, July 2017, October 2018), for both Baltimore and Houston coaches, covering a range of topics from engagement to specific goal types and goal setting strategies informed by the 12 executive skills, with separate sessions for new staff training and seasoned staff refresher training;
- Four two-hour case conference sessions per site, focused on a particular real-life case; and
- One two-day in-person cross-site learning exchange training event (October 2019).

In addition, coaches and supervisors participated in **topical trainings** on subjects such as obtaining and reviewing labor market information from NYCLMIS, entering data about service receipt into the service tracking system, adopting and applying Motivational Interviewing techniques, program operations, recording case notes, and program marketing and recruitment.

Finally, MyGoals coaches received **ad hoc training** during weekly technical assistance meetings; during the first half of 2018, supervisors also received ten hours of training on the responsibilities of supervisors through weekly or biweekly (twice a month) meetings.

Training and technical assistance evolved with the program over time. Baltimore coaches hired in 2018 for the second cohort mentioned during site visits that they believed the initial training was modified based on experiences and feedback from coaches who started in 2017 for the first cohort. The revised training clarified the flexibility in the coaching process and that the 12 steps need not be linear but should reflect the participant's current situation. Coaches also reported changes to the structure of technical assistance calls over time; the program designer initially conducted occasional joint calls with Baltimore and Houston coaches, but gradually, calls became site-specific as coaches raised and sought support for different types of challenges.

### **Participants and coaches had monthly contact, as planned; by month nine, about two-thirds were still participating in the program.**

During the first nine months after enrollment, participants had contact with their coach on average about once per month, which includes coaching as well as phone and email check-ins and scheduling contacts. As Exhibit 5 shows, participants and coaches in both cities had an average of ten contacts during the first nine months, which aligns with the program design of a minimum of one contact per month. Nearly half of participants in each city had 11 or more contacts in the first nine months.

Most participants had at least one substantive contact with a coach in the first nine months, and approximately one in three participants had at least seven to nine substantive contacts (Exhibit 5). Substantive contacts include at least 20-30 minutes of dialogue between the coach and participant, with a discussion of goal-setting, accomplishments, or obstacles and documentation of an action plan or next steps. The first substantive coaching session that a participant has is the Getting to Know You session, where the coach and participant review the Getting to Know You Questionnaire, the Executive Skills Questionnaire, and discuss the participant’s goals.

During site visits, coaches reported making continued attempts to contact non-responsive participants. Still, some MyGoals participants had not yet attended a substantive coaching session by the end of the ninth follow-up month: 23 percent of Baltimore participants and 14 percent of Houston participants had no substantive contact, as shown in Exhibit 5.

**Exhibit 5.  
Number of  
Contacts in  
the First Nine  
Months After  
Program  
Enrollment**

	Baltimore	Houston
Mean number of any contacts in the first nine months	10.3	9.6
Month 1	2.1	2.2
Month 2	1.2	1.1
Month 3	1.1	1.0
Percentage whose number of contacts in the first nine months was:		
0	7.2	2.5
1-5	20.6	20.7
6-10	23.1	31.1
11-15	27.6	35.3
16-20	16.1	8.9
More than 20	5.4	1.5
Percentage of participants who had at least one substantive coaching session in the first nine months		
Number of months participated in at least one substantive coaching session:		
0	23.1	14.0
1-3	23.6	21.8
4-6	22.3	26.9
7-9	31.1	37.2

Note: MyGoals defines a substantive coaching session as: (1) including at least 20-30 minutes of dialogue between the coach and participant, (2) including discussion of goal-setting, accomplishments, and/or obstacles framed within the 12-step coaching model, and (3) including documentation of an action plan or next steps.

Source: Staff records from the MyGoals service tracking system for the Baltimore group (n=373) and the Houston group (n=527). Sample size reflects one Houston participant who withdrew from the study.

Before COVID-19, coach-participant contacts (including substantive contacts) took place virtually as well as in-person. Contacts between coaches and participants most often occurred in-person or by telephone, though approximately one in nine contacts were through email or mail correspondence (Exhibit 6). In Houston, coaches reported meeting with participants via video conferencing phone apps, especially when transportation was a challenge for participants, as well as when a participant was employed and could not easily attend an in-person meeting.

### Exhibit 6. Contact Mode

	Baltimore	Houston
Percent of all contacts by mode		
In person	33.2	43.9
Telephone	49.7	40.8
Email	8.3	12.7
Mail correspondence	0.4	0.1

Source: Staff records from the MyGoals service tracking system for people with at least one contact in the Baltimore group (n=332) and the Houston group (n=503).

Note: Teleconferencing contacts are recorded as telephone contacts.

Participants can remain in MyGoals for three years, even if they become ineligible for housing assistance or move away. After the first month of enrollment, nearly all participants (90 percent in Baltimore and 95 percent in Houston) had some contact with their coach (Exhibit 7). Participation in the program remained high through the first year of coaching; by the ninth month after study enrollment, seven out of ten participants in both cities were still participating in the program (Exhibit 7).

### Exhibit 7. Percentage of Participants who had any Contact after the First Month and after the Eighth Month, by Location

	Baltimore	Houston
After the first month	89.8	95.3
After the eighth month	71.8	78.9

Source: Staff records from the MyGoals service tracking system for the Baltimore group (n=373) and the Houston group (n=527). This includes only contacts that occurred in the first year after study enrollment. Sample size reflects one Houston participant who withdrew from the study.

### Coaches and participants had mixed perceptions regarding the value of incentives.

A key MyGoals component is the offer of financial incentives at intake (for enrolling in the study), for engagement (attending coaching sessions), and for employment (obtaining and retaining a job). Most participants in both cities received at least one engagement incentive in addition to the intake incentive, with more participants earning incentives in Houston than Baltimore (86 percent versus 77 percent, respectively), as shown in Exhibit 8. Among those who received any engagement incentives, the amount paid was similar in both cities; participants on average received approximately two-thirds of potential program intake and engagement incentives during their first nine months (average of \$192 out of a potential \$320<sup>10</sup>).

<sup>10</sup> Potential incentive awards estimated by adding the \$50 getting started bonus to nine months of \$30 engagement payments (\$270) for a total of \$320.

## Exhibit 8. Participant Receipt of Incentives

		Baltimore	Houston
Engagement Incentives (includes intake and monthly engagement)	% Received One or More	76.9	86.0
	Average Amount per Participant (excluding those with none)	\$183	\$200
Employment Incentives (includes all employment- related incentives)	% Received One or More	11.5	32.8
	Average Amount per Participant (excluding those with none)	\$310	\$348
Total Engagement and Employment Incentives	% Received One or More	76.9	86.0
	Average Amount per Participant (excluding those with none)	\$230	\$333

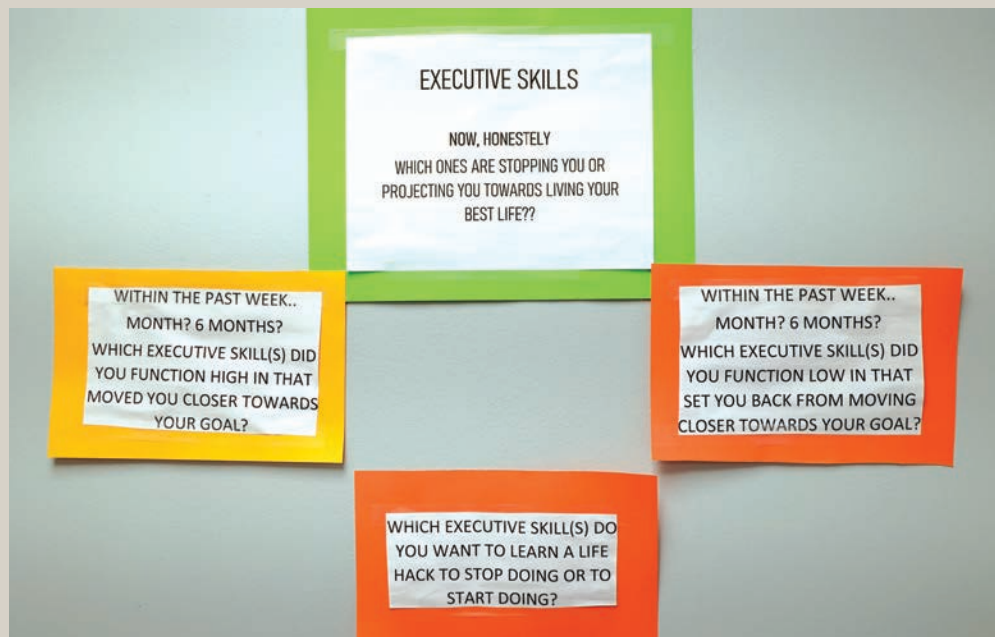
Source: Staff records from the MyGoals service tracking system for the Baltimore group (n=373) and the Houston group (n=527). Sample size reflects one Houston participant who withdrew from the study.

Note: Incentive types are described in Exhibit 1. Additional incentive payment information is available in Table B-7 in Appendix B.

Most participants had not yet earned an employment incentive by month nine. In the first nine months after enrollment, about one-third of Houston participants earned an employment incentive, compared with 12 percent of Baltimore participants. Among those who received an employment incentive, the average amount paid was slightly higher in Houston (\$348) than Baltimore (\$310), as shown in Exhibit 8. Reflecting the higher amount of employment and engagement incentives earned by participants in Houston, the overall average incentive amounts per participant, excluding those who received no incentive, was larger in Houston than Baltimore (\$333 versus \$230).

Most coaches reported positive perceptions of the incentives in the staff survey; 22 percent of coaches reported incentives were “extremely valuable,” 67 percent “valuable,” and 11 percent “somewhat valuable.” No coaches reported incentives were “rarely valuable” or “not valuable.” During site visit interviews, however, impressions about the role of incentives in motivating participants to remain in the program were mixed. Some coaches in Houston described incentives as important to encouraging engagement because they help cover some participants’ transportation costs for attending in-person meetings at the central housing office. One coach predicted that if MyGoals offered no incentives, participation would decrease because some participants depend on the monthly engagement incentive to cover household expenses (e.g., paying a phone bill). Nevertheless, during a temporary period when incentive payments were delayed in Houston because of a processing issue, coaches did not perceive an effect on participant behavior (though, during the delay, participants likely anticipated receiving the incentive eventually).

**Wall postings help participants reflect on their executive skills.**



(Photo: Rich Clement, Mathematica)

Participants also expressed mixed views about the role of incentives in encouraging participation and goal attainment. During in-depth interviews with a small number of participants, some stated that incentives were financially helpful, and some thought that incentives motivated goal progress and program engagement. One participant reported the incentives were the only benefit of the program. However, others said the incentives did not motivate them to participate or that they were secondary to the other help they got from the program.

**Participants reported receipt of referrals and other supports, but some indicated more direct employment assistance would also be helpful.**

Although MyGoals does not provide direct services such as mental health counseling, job training, or financial assistance (other than the incentives), coaches make referrals to outside agencies when asked. Coaches also bring partners on site to provide learning opportunities for participants. This occurred more in Baltimore, where the MyGoals program was operated within the context of a public housing community. MyGoals staff worked with the housing authority to bring in organizations that conducted workshops on a range of topics, such as:

- Financial literacy, including home ownership and maintaining checking accounts (with support and sponsorship from Bank of America and other local banks) and budgeting and financial management education provided through the Creating Assets, Savings, and Hope Campaign of Maryland (Baltimore);
- Health and wellness, including a plant-based dinner that was hosted for participants by a health organization concerned about locally widespread health challenges of high blood pressure and diabetes; and

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- Substance use, including training on administering an antidote for opioid-related overdoses, to help those in the community who might need help in this way.

During in-depth interviews participants reported that they received referrals to workshops, events, and community resources; however, when asked for suggested program improvements, almost half indicated that the program should offer more concrete job search resources, such as interviewing skills training, job fairs, and job placements, including “warm” referrals to a hiring manager.

*So, I think one thing that could be improved is there could be more programs geared to help me, or just have more resources in the office, that teach people how to write resumes and how to interview. (Baltimore In-depth Participant Interview)*

**Two MyGoals coaches talk between coaching sessions.**



(Photo: Rich Clement, Mathematica)



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## Summary

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The MyGoals demonstration aims to help housing assistance beneficiaries in Baltimore and Houston become employed and work toward self-sufficiency through a three-year coaching relationship. The program incorporates financial incentives to encourage persistence in coaching sessions, attainment of employment, and employment retention. As a demonstration, the program evolved as it was implemented, as coaches and program designers worked together to address initial challenges. This report described program implementation two years into the demonstration, and participants' experiences during their first nine months in the program.

MyGoals has a highly structured and complex coaching model centered around a coaching methodology that supports participants as they set long-term goals and a pathway to reach them consisting of milestones, SMART goals, and action steps. Coaches received considerable training and ongoing technical assistance from program designers. Although not by design, the coaches were well educated and experienced in the provision of social services. Initially, some coaches struggled with the tiers of goals and how to react when participants were able to set short-term but not long-term goals. The program developers clarified that the participants were not required to start with long-term goals.

A distinguishing feature of MyGoals is an explicit focus on 12 self-regulation skills, referred to by the program as executive skills. From the first coaching session onward, coaches and participants discuss the participants' executive skill strengths and challenges, including how to emphasize strengths in goal setting and work around challenges so they do not become a barrier to goal achievement.

The program was generally implemented as planned and well-received by participants. Coaches were largely nondirective. Incentives were provided, though participants had mixed opinions on whether the incentives increased participation. Participants spoke positively about their coaching experiences. At nine months into the three-year program, most MyGoals participants were still participating in the program.

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 on the project's website: <https://www.acf.hhs.gov/opre/research/project/evaluation-of-coaching-focused-interventions-for-hard-to-employ-tanf-clients-and-other-low-income-populations>.

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# Appendix A: Design of the Evaluation of Employment Coaching for TANF and Related Populations

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## *Overview of 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 adults with low income 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 program 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.

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.

## 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 due to its involvement in another study.

The **impact study** data sources are:

- Baseline data collection from 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: the first surveys were administered in February 2017 and the last was administered in 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.
- In-depth, in-person interviews with coaching participants conducted between March and May 2019.

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- Service receipt data as reported by program staff and recorded in a service tracking system.
  - Telephone discussions with program designers and technical assistance providers (where applicable).
  - 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). Other reports from the evaluation are available online at <https://www.acf.hhs.gov/opre/research/project/evaluation-of-coaching-focused-interventions-for-hard-to-employ-tanf-clients-and-other-low-income-populations>.

## **THE EVALUATION OF MYGOALS**

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MDRC developed MyGoals as a demonstration program with assistance from Arnold Ventures, the Harry and Jeanette Weinberg Foundation, Houston Endowment, Inc., the Kresge Foundation, and the JPB Foundation. These organizations funded the implementation of MyGoals by the two housing authorities, the design and implementation of random assignment, the collection of public housing data, provision of training and technical assistance on the evaluation and program, and some aspects of the impact analysis and reporting. MDRC led the process of developing the model, provided the framework for incorporating random assignment, distributed funds for operating the program in both locations, and provides ongoing implementation guidance. MDRC was not involved in data collection, data analysis, or shaping conclusions for the implementation study. Mathematica will conduct the primary impact analyses with input from MDRC.

Dedicated units within public housing authorities in Baltimore and Houston operated the program. The demonstration's program operations phase will last long enough to provide all participants with a three-year intervention, ending in July 2022 in Houston and in September 2022 in Baltimore.

The evaluation of MyGoals, led by Mathematica and Abt Associates, began in February 2017, when program staff started randomly assigning potential participants to a treatment group that could participate in MyGoals or a control group that could not participate in MyGoals.

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Enrollment in MyGoals did not affect participants' eligibility for housing assistance, and participants in both the treatment group and the control group could access other services in the community with the exception of Jobs Plus and the Family Self-Sufficiency Program, which are also programs managed by the public housing authorities and provide similar services.<sup>11</sup> Participants were invited to participate in MyGoals for up to three years, even if they became ineligible for housing assistance during that time.

For the study, the program staff administered a baseline form to all study participants (n=1,758) administered just before study enrollment (between February 2017 and November 2019). This form differed from the baseline survey administered to participants in other interventions in the evaluation because MyGoals had already begun enrolling participants into a separate evaluation before they joined the Evaluation of Employment Coaching in 2018, so they continued using the same baseline form. Program managers (n=2) and staff (n=11) responded to a web-based survey about the program and its participants between January and March 2019. The evaluation team visited both study cities in April 2019, with a follow-up visit to Baltimore in November 2019. While on site, the evaluation team conducted in-person discussions with program managers, supervisors, and coaches, as well as directly observed coaching sessions. While on site, the evaluation team also collected program documents such as handbooks and program standards. 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 in Houston and 14 video recordings in Baltimore (for a total of 29) that occurred between May and July 2019 and conducted in-depth, in-person interviews with 20 participants (11 in Houston and nine in Baltimore) in May 2019.

Finally, the implementation study draws on service receipt data recorded by program staff in the MyGoals service tracking system. This report presents information on service receipt for the treatment group members who enrolled in the study before or on July 15, 2019 (n=499 for Houston; 373 for Baltimore) and includes data on the coaching received during the first nine months after study enrollment. This information includes the number, type, and mode of coaching sessions that MyGoals participants attended, as well as the topics discussed during sessions.

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<sup>11</sup> These programs, funded by the U.S. Department of Housing and Urban Development, offer job placement assistance, financial incentives, and coaching to public housing residents and housing choice voucher participants in Houston and Baltimore. The evaluation was designed to compare MyGoals to other services in the community and not to similar services provided by the housing authorities. Hence, households already receiving these other housing authority services could not participate in MyGoals.

## Appendix B: Supplemental Tables

### Exhibit B.1 Baseline Characteristics for MyGoals Program Group

Baseline Characteristic	Baltimore	Houston
<b>Demographics</b>		
Average age (in years)	38	37
Female (percentage)	86	89
Race and ethnicity (percentage)		
Hispanic	0	4
Black, non-Hispanic	97	94
White, non-Hispanic	2	2
Other	1	0
Person with disability (percentage)	30	19
Respondents who have another adult living in the household (percentage)	31	28
Respondents who are a parent or caregiver (percentage)	56	63
Respondents who are a parent or caregiver with no other adult in the house (percentage of all program group members)	42	49
<b>Socioeconomic status</b>		
Does not have high school diploma or GED credential (percentage)	27	22
Receiving any income from Temporary Assistance for Needy Families (percentage)	24	2
Receiving any income from Social Security/SSI (percentage)	26	14
Receiving any income from wages (percentage)	16	9
Average annual income from wages, for respondents with any wage income (dollars)	14,866	13,764
<b>Employment status and history</b>		
Not employed at the time of study enrollment (percentage)	98	99
Employed working 20 or fewer hours per month (percentage)	2	2
Average number of months employed in the 12 months prior to study enrollment (months)	2	3

Source: Gender, race, disability status, and socioeconomic status come from Public Housing Authority data collected at the last recertification for housing benefits before enrolling in the study. Age, employment status and history, and education at study enrollment come from the MyGoals baseline form. Includes study participants in the Baltimore group (n=376) and Houston group (n=528).

Note: Missing data rates ranged between 0 percent and 8 percent. Public housing data are missing for 40 Houston participants, and those participants are omitted from the measures that are calculated using those data.



## Exhibit B.2. Contacts per Participant during the First Nine Months after Study Enrollment

Contact Characteristic	Baltimore	Houston
<b>Mean number of contacts:</b>		
In the first 3 months	4.4	4.3
In the first month	2.1	2.2
In the second month	1.2	1.1
In the third month	1.1	1.0
In the first 6 months	7.4	7.0
In the first 9 months	10.3	9.6
<b>Percentage of participants whose number of contacts in the first nine months was:</b>		
0	7.2	2.5
1-5	20.6	20.7
6-10	23.1	31.1
11-15	27.6	35.3
16-20	16.1	8.9
More than 20	5.4	1.5
<b>Number of months participated in at least one "substantive" coaching session:</b>		
0	23.1	14.0
1-3	23.6	21.8
4-6	22.3	26.9
7-9	31.1	37.2

Note: MyGoals defines a substantive coaching session as: (1) including at least 20-30 minutes of dialogue between the coach and participant, (2) including discussion of goal-setting, accomplishments, and/or obstacles framed within the 12-step coaching model, and (3) including documentation of an action plan or next steps.

Source: Staff records from the MyGoals service tracking system for the Baltimore group (n=373) and the Houston group (n=527). Sample size reflects one Houston participant who withdrew from the study.

## Exhibit B.3. Contact Mode and Location in First Nine Months after Study Enrollment

Contact mode and location	Baltimore	Houston
<b>Percentage of contacts by mode per participant (mean)</b>		
In person	33.2	43.9
Telephone	49.7	40.8
Email	8.3	12.7
Mail correspondence	0.4	0.1
<b>Percentage of substantive contacts by mode per participant (mean)</b>		
In person	67.9	71.1
Telephone	31.3	27.9
Email	0.2	0.5
Mail correspondence	0.0	0.0

Source: Staff records from the MyGoals service tracking system. Percentage of contacts is limited to participants with at least one contact (n=332 in Baltimore and n=503 in Houston). Percentage of substantive contacts is limited to participants with at least one substantive contact (n=261 in Baltimore and n=415 in Houston).

**Exhibit B.4.  
Goal Setting  
in First  
Nine Months  
after Study  
Enrollment**

<b>Goal setting</b>	<b>Baltimore</b>	<b>Houston</b>
Percentage of participants who set a goal (long-term goal, milestone, SMART goal, or action step)	69.6	79.5
Percentage of participants who set a long-term goal	53.8	60.5
Percentage of participants who set a milestone	38.2	54.9
Percentage of participants who set a SMART goal	63.0	78.4
Percentage of participants who set an action step	57.1	58.3
<b>Percentage of participants who set a goal (long-term goal, milestone, SMART goal, or action step), by domain</b>		
Employment and career management	54.6	71.3
Education and training	40.5	60.0
Financial management	13.6	33.1
Personal and family well-being	23.8	48.9
<b>Percentage of participants who set a long-term goal, by domain</b>		
Employment and career management	40.3	50.3
Education and training	11.4	7.9
Financial management	5.9	4.6
Personal and family well-being	5.9	3.6
<b>Percentage of participants who set a milestone, by domain</b>		
Employment and career management	20.4	25.4
Education and training	15.9	35.9
Financial management	3.5	9.8
Personal and family well-being	5.6	9.0
<b>Percentage of participants who set a SMART goal, by domain</b>		
Employment and career management	37.3	59.4
Education/training	31.6	53.9
Financial management	11.3	27.9
Personal and family well-being	19.8	46.5
<b>Percentage of participants who set an action step, by domain</b>		
Employment and career management	33.5	39.5
Education/training	26.8	36.6
Financial management	9.9	14.6
Personal and family well-being	16.9	26.8

Notes: Long-term goals are specific and concrete objectives that a participant wants to achieve, that could take at least 2 or 3 years to accomplish.

Milestones are specific markers to set to accomplish the long-term goal. Each participant will have multiple milestones per long-term goal that could each take a few months to a year to accomplish.

SMART goals are smaller steps needed to reach each milestone. Each participant will have multiple SMART goals for each milestone that usually take 2 to 4 weeks each to complete.

Personal and family well-being goals pertain to participants' personal health and mental health and that of their family members, other family circumstances, and non-family relationships that can aid or impede their career advancement.

Source: Staff records from the MyGoals service tracking system for the Baltimore group (n=373) and the Houston group (n=527). Sample size reflects one Houston participant who withdrew from the study.

**Exhibit B.5.  
Action Step  
Completion  
in First Nine  
Months  
after Study  
Enrollment**

<b>Action step completion</b>	<b>Baltimore</b>	<b>Houston</b>
Percentage of participants who completed at least one action step, among all participants	30.0	47.4
Percentage of action steps participants completed, among those participants who set an action step	28.6	55.1
Number of action steps participants completed, among those participants who set an action step		
0	47.4	18.6
1	22.5	11.4
2	10.8	10.4
3	9.4	5.9
4	4.2	8.5
5	3.3	5.9
More than 5	2.3	39.4

Source: Staff records from the MyGoals service tracking system for the Baltimore group (n=373) and the Houston group (n=527). Sample size reflects one Houston participant who withdrew from the study.

**Exhibit B.6.  
Referrals in  
First Nine  
Months  
after Study  
Enrollment**

<b>Referrals</b>	<b>Baltimore</b>	<b>Houston</b>
Mean number of referrals	0.8	0.4
<b>Percentage of participants whose number of referrals received was:</b>		
0	60.3	76.9
1	19.3	13.1
2	8.0	5.9
More than 2	12.3	4.2
<b>Percentage of participants who received at least one referral, by type:</b>		
Child care	0.3	0.9
Counseling services	14.5	2.8
Education	7.8	6.3
Employment related services	13.9	10.6
Health care	2.9	0.9
Homeownership counseling	4.3	0.0
Job retention activities	0.5	0.0
Job or technical training	9.4	1.7
Participant assistance activities	7.2	6.1
Post-secondary classes	4.8	1.1
Transportation	2.1	0.6

Source: Staff records from the MyGoals service tracking system for the Baltimore group (n=373) and the Houston group (n=527). Sample size reflects one Houston participant who withdrew from the study.

**Exhibit B.7.  
Incentives  
in First Nine  
Months  
after Study  
Enrollment**

<b>Incentives</b>	<b>Baltimore</b>	<b>Houston</b>
<b>All incentives</b>		
Percentage of participants who received any incentive	76.9	86.0
Mean number of incentives received per participant of those who received an incentive	4.4	5.7
Mean total amount of incentives received per participant, including those who received no incentives (dollars)	177	286
Mean total amount of incentives received per participant, excluding those who received no incentives (dollars)	230	333
Percentage of participants whose amount of incentives received, including those who received no incentives, was:		
\$0 < \$250	48.5	41.0
\$250 < \$500	23.1	30.2
\$500 or greater	5.4	14.8
<b>Engagement incentives</b>		
Percentage of participants who received an engagement incentive	76.9	86.0
Percentage who received a "getting started" bonus"+	72.7	85.6
Percentage who received a monthly engagement incentive	69.7	79.1
Mean number of total engagement incentives received per participant, including those who received no incentives	4.2	5.2
Percentage of participants whose number of engagement incentives received was:		
0	23.1	14.0
1-3	22.0	19.4
4-6	22.3	25.2
7-10	32.7	41.4
Percentage of participants whose number of monthly engagement incentives received, excluding the "getting started" bonus, was:		
0	30.3	20.9
1-3	22.0	20.5
4-6	24.1	27.5
7-10	23.6	31.1
Mean total amount of engagement incentives received per participant who received at least one incentive (dollars)	183	200
Mean total amount of engagement incentives received per participant including those who received no incentives (dollars)	141	172
<b>Employment incentives</b>		
Percentage of participants who received an employment incentive	11.5	32.8
Type of employment incentive received		
Employment transitions incentive		
Not working to part-time	5.9	15.7
Not working to full-time	5.9	18.2
Part-time to full-time	0.3	3.0

(continued)

**Exhibit B.7.  
Incentives  
in First Nine  
Months  
after Study  
Enrollment**

<b>Incentives</b>	<b>Baltimore</b>	<b>Houston</b>
Employment retention incentive		
3-month employment retention	5.1	14.4
Mean number of total employment incentives received per participant	0.2	0.6
Percentage of participants whose number of employment incentives received was:		
0	88.5	67.2
1	6.2	16.3
2	3.8	9.7
3	1.6	6.8
Total amount of employment incentives received per participant who received at least one employment incentive (dollars)	310	348
Mean total amount of employment incentives received per participant including those who received no incentives (dollars)	36	114

Note: Participants could receive only one engagement incentive per calendar month but could receive up to ten incentives in the nine months since random assignment because that period could overlap with ten calendar months.

+Due to a data recording issue, some participants who completed a "Getting to Know You" session were not recorded in the system as having earned a "Getting Started" bonus incentive payment. When the data recording issue was discovered, those payments were made to participants. Everyone who earned any engagement incentives (76.9% in Baltimore and 86.0% in Houston), received at least the "Getting Started" bonus.

Source: Staff records from the MyGoals service tracking system for the Baltimore group (n=373) and the Houston group (n=527). Sample size reflects one Houston participant who withdrew from the study.

