Rethinking Job Search

Annual Report I

Prepared for
Incite, Inc.

Prepared by
Public Policy Associates, Incorporated

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Public Policy Associates, Incorporated is a public policy research, development, and evaluation firm headquartered in Lansing, Michigan. We serve clients in the public, private, and nonprofit sectors at the national, state, and local levels by conducting research, analysis, and evaluation that supports informed strategic decision making.

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Acknowledgments

The evaluation team appreciates the efforts of the Incite, Inc. project team members for their willing communication and enthusiastic participation in planning during this first year of the evaluation. In particular, Jennifer Johnson, Jennifer Senner, Susan Barksdale, Tony Frazier, David Gerstenfeld, and Lisa Richardson have welcomed our team into the project and contributed greatly to the development of the evaluation design and early activities.

We also thank the workforce boards and their staff, Oregon Employment Department Unemployment Insurance and Employment Services staff, and others who assisted during the project’s planning year.

Colleen E. Graber and Nancy M. McCrohan, Ph.D.
Rethinking Job Search Evaluation Directors
Executive Summary

A Workforce Innovation Fund Grant in Context

The Workforce Innovation Fund (WIF) of the U.S. Department of Labor seeks to support service delivery and system change strategies using innovative approaches. WIF is expected to build the evidence base for how to achieve employment and training outcomes. This investment could then not only spur regionalized benefits but also inject more rigor and knowledge-sharing within the field of workforce development.

Oregon’s workforce system is the setting for the particular grant-funded program being discussed here, Rethinking Job Search. As a result of high unemployment in Oregon, Incite, Inc. (formerly Job Growers) looked for effective strategies for rapid reemployment of the long-term unemployed. They discovered an article from Dr. Judith Proudfoot and others entitled, “Effect of cognitive-behavioural training on job-finding among long-term unemployed people” and it described a study conducted in 1996 in the United Kingdom.¹ The study found that the participants who went through a brief job search training that was coupled with cognitive-behavioral therapy generated higher employment rates than a comparison group that went through a traditional job search program of comparable length. Working across ten workforce centers in the state, the Rethinking program aims to deliver a four-week cognitive behavioral education workshop to customers of the system who are receiving unemployment insurance (UI) benefits. If the evaluation shows this to be an effective intervention, this program has nationwide potential, as the challenge of reconnecting the unemployed with work is not unique to Oregon.

Overview of the Rethinking Job Search Program

Incite piloted the Rethinking program in four WorkSource centers in 2013-2014. The design of the current program was crafted based on the lessons learned from that experience and demonstrations in other countries. The target population for the new workforce services is registered Workforce Innovation and Opportunity Act (WIOA) participants who are receiving UI benefits. The Rethinking workshop series is designed to enhance their ability to think and act effectively in managing the challenge of job

seeking. The curriculum includes methods such as self-reflection and facilitated discussion. Conceptually, the program is grounded in the assumptions—based on existing evidence—that job seekers who possess emotional resilience and determination will be better positioned to find employment. They can also learn to be better prepared for the challenges that unemployment and job searching brings.

### Year One Challenges

**Pilot Process.** Rethinking project leadership decided to implement a pilot of the program in this first year that was not part of the original plan. As a result, there was the challenge of additional effort and need for quicker development of tools and partnerships for the pilot.

**WIOA.** The Rethinking project was affected by the implementation of WIOA in that it caused Oregon to reorganize its workforce areas over the summer. Trying to balance reorganization at the local level with project implementation (e.g., policy alignment, staff availability, etc.) has meant some difficulty in establishing agreements with sites.

### Year One Successes

**Planning.** The work of the first year was largely aligned with what was planned on the expected timetable. The Rethinking pilot motivated the partners involved in the planning process, resulted in policies to be used in the future implementation of the program, and led to the selection of recruiting tools.

**Partnering.** The interactions between the Rethinking partners are positive and have been beneficial for the planning for the program. Contracts and memorandums of understanding are establishing clear roles and responsibilities. The Incite team has shown a great willingness to engage with the evaluation team and fully cooperated with the evaluation team in developing the evaluation design.

**Staffing.** The Incite team was well-staffed with capable, determined personnel. Their approach to the project ensured that the decision-making process was inclusive and productive. Hiring and training of facilitators has been well planned in order to maintain fidelity. Requisite skills have been defined and a process for engagement/hire has been developed and recommended to the workforce boards.
Recommendations for Year Two

There is still a great deal to accomplish as the program launches in WorkSource Oregon centers across the state. Looking ahead to the second year of the grant, the evaluation team has developed several suggestions designed to help the project team to continue to implement the program effectively:

- **Increase the regularity and relevance of communications about the program with partners.** Partners have expressed the desire for more two-way communication, especially in regards to the timing of requests and deliverables and high-level updates on the program’s progress, among others. The newsletter and the intranet of the Rethinking website are two means for this communication, but semi-regular other contacts (such as meetings) would also be useful.

- **Strike a balance between the innovative nature of the project and the existing policies and procedures of the workforce boards.** The Rethinking model is a rare approach to assisting job seekers. Already the program has raised some questions about how its premise fits into the workforce system. Incite should work to ensure that partner interests are taken into consideration while also protecting the integrity of the program’s design. Tackling this challenge through the project may well prove one of the most interesting aspects for the field.

- **Monitor the quality of program implementation.** The work completed in year one positions the program well for fidelity across sites. However, the facilitators are not in place yet. The facilitators are a major core component of the Rethinking program, and how they deliver the curriculum, and their success in doing so could have a tremendous effect on the outcomes. It will be important for the program’s leadership to closely monitor the quality of its delivery, and include the partners in the planning for this monitoring.

- **Continue close coordination with the evaluation team.** During the first year, the evaluation team was deeply involved in discussions about data collection and sources, recruitment, and communications as Incite developed the program. Continuing this high level of engagement between Incite and the evaluation team will be essential to a strong study, particularly as the circle of stakeholders expands to include facilitators and customers of the WorkSource centers.
Introduction

When federal funds are invested in public programs, it is essential to be able to answer the question, “Did it matter?” The Rethinking Job Search grant program has the potential to make a difference for thousands of Oregon residents, and the evaluation will provide an important insight into whether it realizes that potential.

This report, the first in a series of annual reports, describes the pre-implementation planning and the development of the grant project.

Project Overview

Incite, Inc., the entity responsible for the Salem, Oregon workforce region, is the grantee lead for this project. Incite piloted the Rethinking program in four WorkSource Oregon (WSO) regions in 2013-2014 (hereafter referred to as the 2013 pilot) and is using the Workforce Innovation Fund (WIF) grant to further expand the program to other areas of the state. The design of the current program was crafted based on the lessons learned from that early pilot experience and examples of similar efforts in other countries, including the United Kingdom, Australia, and Canada. The target population for the new workforce services is registered Workforce Innovation and Opportunity Act (WIOA) participants who are receiving Unemployment Insurance (UI) benefits, which makes this program a bit different from past iterations that focused more broadly on long-term unemployed customers.

Conceptually, the program is grounded in assumptions, based on existing evidence, that job seekers who possess emotional resilience and determination will be better positioned to find employment. They can also learn to be better prepared for the challenges that unemployment and job searching brings. Although it draws upon cognitive behavioral theory, it is not a mental health program.

The Rethinking workshop series—to be delivered over four weeks—is designed to enhance the ability to think and act effectively in managing the challenge of job seeking.

2 Incite, Inc. changed its branding in 2014, after winning the WIF grant. Its previous name was Job Growers.
The curriculum is grounded in educational learning objectives and uses methods such as self-reflection and facilitated discussion. Participants will be asked to do “homework” assignments and keep a job search log, which will be used by the facilitators (instructors) to help to determine participant progress. The logs also count toward an individual’s job search requirements for UI benefits.

Job seekers are recruited into the program through a mailing from Oregon’s UI office, as well as through on-site eligibility determination at the WorkSource centers. Online videos and a project-specific website further inform the potential participants about the opportunity and link to registration. The workshops will be conducted in-person at the participating centers on a set schedule.

**Overview of the Evaluation Approach**

The evaluation design by Public Policy Associates, Inc. (PPA) includes three elements: an implementation evaluation, an impact study, and a cost study. Together, these three pieces will provide the evidence that will allow all research questions to be answered fully and meaningfully.

**Implementation Study**

For the implementation study, the effectiveness and results of the systems change will be assessed using both qualitative and quantitative data. Interview, survey, and focus group data will provide a rich insight into the perspectives and experiences of the participants, program leaders and staff, and other stakeholders regarding the systems change. This line of inquiry looks at systems change as indicated by enhancing the services offered to more fully address the barriers encountered by participants. In addition, an analysis of UI and WSO administrative records will provide important quantitative insight into cost-efficiencies and the leveraging of funds. The unit of analysis is the collaboration and the changes related to service delivery to their common client base, strategies, resources, policy, and practices.

**Impact Study**

For the impact study, the effectiveness of the cognitive-behavioral education provided to participants will be assessed by comparing their results to those of a comparison group that is constructed using propensity score matching, a process that addresses potential bias in the selection of participants and strengthens the internal validity of the study. PPA will examine the differences between the employment, retention, and length of time receiving unemployment benefits of the participants and the comparison
group at the beginning and the end of the study. This will reveal the progress that they have made and provide an insight into the causal relationship between the services provided by the program and the results obtained. Within the participant group, the number of facilitated workshops will be carefully tracked to determine the effectiveness of partial or full completion of the intervention. This will allow analyses to determine whether the intensity of services actually used by each individual correlates with that individual’s outcomes. The unit of analysis is at the individual level.

**Cost Study**

For the cost-effectiveness analysis, the relative cost effectiveness of the Rethinking program will be assessed by establishing the per-participant cost of the intervention. The per-participant cost will be compared to the expenses incurred by comparison group members in the unemployment system. To create the per-participant cost for the intervention, PPA plans to examine the costs of training facilitators and the costs of providing the series of twelve facilitated workshops to participants. These costs will be examined in the context of relative differences in employment, retention, and length of time on unemployment between the participants and the comparison group members. This aspect of the evaluation will determine if the Rethinking intervention results in cost savings for the State of Oregon. The unit of analysis is at the center level.

**Focus of This Report**

Given the early stage of the grant period, this report focuses solely on the implementation study of the Rethinking program, providing an overview of program design and development activities to date over the course of the past year. The impact study and cost study are addressed in this report only in terms of how the processes and procedures necessary for these components are being integrated into the project.

A meaningful evaluation must be guided by clear research questions that are set out in advance of the research. This ensures that all research activities are relevant to knowledge that is needed by Incite, the U.S. Department of Labor, and the evaluation team. The research for this report is designed to address only the research questions that are relevant at this stage of the grant period. They include:

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3 The complete list of research questions is included in the Final Evaluation Design Report (August 2015) on page 24.
1. What are the primary elements of the Rethinking Job Search?
2. To what extent was fidelity to the model maintained at each of the sites and across the sites?
3. Did the program unfold as planned and on the intended timeline?
4. How satisfied were the participants and other stakeholders with the project?
5. How did the project build in sustainable strategies for continuing the collaboration and the programming after the grant?

These questions may not be fully answered by this report, but important preliminary findings are available. The report also includes process recommendations. These findings and recommendations are intended to help Incite and other stakeholders to pause and reflect on which program components are unfolding as intended and which ones are not. Most important, this report provides an opportunity to consider possibilities for improving project implementation and, ultimately, for supporting strong outcomes.
Setting the Stage for Rethinking Job Search Implementation

Documenting the Theory of Change

At its core, the Rethinking program is intended to provide individuals who recently became unemployed with the self-awareness and emotional strategies needed to effectively job search. The workshops, which will include in-class and homework activities, are designed to help individuals identify self-imposed barriers and realize steps to adapt to a productive mindset. This theory was informed by Incite’s research into the application of a cognitive behavioral perspective in workforce development and its experience with the 2013 pilot.

However, to ensure the clearest theory of change possible, during February and March of 2015 both the evaluation team and the Incite team reflected on the logic model prepared for the grant proposal. Subsequently, the logic model for the Rethinking program was revised to further articulate the connections between activities and outcomes and distinguish outputs from outcomes. The updated logic model was included in the evaluation design report and is guiding the program’s development. Among the Incite team and its partners, the theory of change is consistently understood.

The Project Team

Incite, as the administrator of the Rethinking project, is dedicating significant staff resources to the task of designing and overseeing the implementation of the program in ten WorkSource centers in eight local workforce boards (LWBs) across Oregon.

Rethinking Job Search: Long-Term Outcome Goals
- Partners will have built a system of communication and collaboration, want to work together more
- Program shared with field at state and national levels
- Participants will have higher rates of employment, collect unemployment benefits for shorter period, find employment more quickly, have higher job retention
- Cost effective
Core Team Members

The Operational Leadership Team is the group responsible for administering the Rethinking project. This team includes representatives from Incite, the Oregon Employment Department, and the participating LWBs. One of the achievements in the first year of the Rethinking project was the hiring of the project manager at Incite. The members of the Operational Leadership Team can be seen in Table 1.

<table>
<thead>
<tr>
<th>Organization</th>
<th>Name</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>WorkSystems, Inc.</td>
<td>Blair Schaeffer-Bisht</td>
<td>Project Manager</td>
</tr>
<tr>
<td>Incite, Inc.</td>
<td>Jennifer Johnson</td>
<td>Project Manager</td>
</tr>
<tr>
<td>Incite, Inc.</td>
<td>Susan Barksdale</td>
<td>Cognitive Behavioral Specialist</td>
</tr>
<tr>
<td>Workforce Investment Board of Clackamas County</td>
<td>Amy Black</td>
<td>Project Manager</td>
</tr>
<tr>
<td>Oregon Northwest Workforce Investment Board</td>
<td>Heather DeSart</td>
<td>Executive Director</td>
</tr>
<tr>
<td>Lane Workforce Partnership</td>
<td>Jessica Cahill</td>
<td>Project Manager</td>
</tr>
<tr>
<td>Rogue Workforce Partnership</td>
<td>Aurora King</td>
<td>Project Manager</td>
</tr>
<tr>
<td>East Cascades Workforce Investment Board</td>
<td>Liz Casey</td>
<td>Transition Coordinator</td>
</tr>
<tr>
<td>South Coast Workforce Investment Board</td>
<td>Cynthia Stewart</td>
<td>Transition Coordinator</td>
</tr>
<tr>
<td>Oregon Employment Department, Employment Services</td>
<td>Jim Pfarrer</td>
<td>Director</td>
</tr>
<tr>
<td>Oregon Employment Department, Unemployment Insurance</td>
<td>David Gerstenfeld</td>
<td>Director</td>
</tr>
</tbody>
</table>

The Rethinking team seems to have engaged the right parties during the planning process, and achieved a solid start with a new partner, the UI department. In order to enhance the services delivered in the workforce system, the program seeks to create alignment between UI and WorkSource Oregon. This level of collaboration across these partners is a notable culture shift compared to the past when UI and the system had little direct interaction. The Rethinking program is providing a forum for improving collaboration within the Oregon workforce system, and this is due in part to partners’ mutual enthusiasm for the model and interest in serving the unemployed population.
The Rethinking Job Search Sites

The areas served by the participating WorkSource centers cover ten counties across eight LWBs. During the first year, there was a notable change in relation to the administration of the sites participating in the Rethinking program. It was originally intended to have seven participating LWBs. However, as a result of the implementation of WIOA, the boards were restructured in Oregon, leaving eight boards responsible for the ten WorkSource Centers. This meant that one of the original centers planned at the grant award was exchanged for another.

Table 2. Implementation Sites

<table>
<thead>
<tr>
<th>WorkSource Location</th>
<th>City</th>
<th>County</th>
<th>Local Workforce Board</th>
</tr>
</thead>
<tbody>
<tr>
<td>WorkSource Clackamas</td>
<td>Oregon City</td>
<td>Clackamas County</td>
<td>Clackamas Workforce Partnership</td>
</tr>
<tr>
<td>WorkSource Lane – Oakmont Center</td>
<td>Eugene</td>
<td>Lane County</td>
<td>Lane Workforce Partnership</td>
</tr>
<tr>
<td>WorkSource Oregon Coos Bay</td>
<td>North Bend</td>
<td>Coos County</td>
<td>Southwestern Oregon Workforce Investment Board</td>
</tr>
<tr>
<td>WorkSource Oregon Newport</td>
<td>Newport</td>
<td>Lincoln County</td>
<td>Oregon Northwest Workforce Investment Board</td>
</tr>
<tr>
<td>WorkSource Oregon Redmond</td>
<td>Redmond</td>
<td>Deschutes County</td>
<td>East Cascades Workforce Investment Board</td>
</tr>
<tr>
<td>WorkSource Oregon Salem Center</td>
<td>Salem</td>
<td>Marion County</td>
<td>Incite, Inc.</td>
</tr>
<tr>
<td>WorkSource Oregon Yamhill Center</td>
<td>McMinnville</td>
<td>Yamhill County</td>
<td>Incite, Inc.</td>
</tr>
<tr>
<td>WorkSource Oregon, The Job Council</td>
<td>Medford</td>
<td>Jackson County</td>
<td>Rogue Workforce Partnership</td>
</tr>
<tr>
<td>WorkSource Portland Metro Beaverton/Hillsboro</td>
<td>Beaverton</td>
<td>Washington County</td>
<td>Worksystems, Inc.</td>
</tr>
<tr>
<td>WorkSource Portland Metro Southeast</td>
<td>Portland</td>
<td>Multnomah County</td>
<td>Worksystems, Inc.</td>
</tr>
</tbody>
</table>
As shown in Table 3, below, the workforce area populations vary from 45,000 to over 730,000. The minority population is low in most counties being served, with seven with fewer than 15 percent. The two most populous counties have minority populations of over 20 percent.

### Table 3. Characteristics of Participating Counties

<table>
<thead>
<tr>
<th>County</th>
<th>Clackamas</th>
<th>Coos</th>
<th>Deschutes</th>
<th>Jackson</th>
<th>Lane</th>
<th>Lincoln</th>
<th>Marion</th>
<th>Multnomah</th>
<th>Washington</th>
<th>Yamhill</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Goal to Serve</td>
<td>180</td>
<td>35</td>
<td>55</td>
<td>105</td>
<td>210</td>
<td>20</td>
<td>150</td>
<td>75</td>
<td>167</td>
<td>60</td>
</tr>
<tr>
<td>Minority Population (%, 2009-2013)</td>
<td>10.3</td>
<td>10.0</td>
<td>6.8</td>
<td>8.2</td>
<td>11.2</td>
<td>11.9</td>
<td>19.1</td>
<td>21.7</td>
<td>22.7</td>
<td>13.2</td>
</tr>
<tr>
<td>Area Hispanic / Latino Population (%, 2009-2013)</td>
<td>7.9</td>
<td>5.6</td>
<td>7.5</td>
<td>11.1</td>
<td>7.6</td>
<td>8.1</td>
<td>24.6</td>
<td>10.9</td>
<td>15.8</td>
<td>14.9</td>
</tr>
<tr>
<td>Area Bachelor’s Degree or Higher Ages 25+ (%, 2009-2013)</td>
<td>18.0</td>
<td>9.0</td>
<td>17.1</td>
<td>12.7</td>
<td>14.7</td>
<td>12.0</td>
<td>11.1</td>
<td>25.1</td>
<td>24.3</td>
<td>12.3</td>
</tr>
<tr>
<td>Population 16+ in Civilian Labor Force (% 2009-2013)</td>
<td>65.5</td>
<td>52.6</td>
<td>62.1</td>
<td>59.4</td>
<td>59.9</td>
<td>56.9</td>
<td>62.9</td>
<td>69.1</td>
<td>69.9</td>
<td>63.3</td>
</tr>
<tr>
<td>Unemployment Rate (%, 2014)</td>
<td>6.3</td>
<td>9.2</td>
<td>7.9</td>
<td>8.6</td>
<td>7.1</td>
<td>8.0</td>
<td>7.5</td>
<td>6.1</td>
<td>5.7</td>
<td>6.6</td>
</tr>
<tr>
<td>Poverty Rate (%2009-2013)</td>
<td>9.8</td>
<td>17.8</td>
<td>14.5</td>
<td>17.2</td>
<td>20.0</td>
<td>16.0</td>
<td>18.6</td>
<td>17.8</td>
<td>11.4</td>
<td>14.6</td>
</tr>
</tbody>
</table>

During the first year, LWBs developed and pursued signed memorandums of understanding (MOUs) with Incite. The MOUs detailed the duties of all parties and intended to ensure that fidelity is maintained across all locations. The process of establishing contracts with the LWBs began in the fall of 2015. LWB staff have found

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that the draft contract was thorough and clear. They have expressed some concerns, however, about details such as:

- **Support services as defined by WIOA and how that may apply to the use of a gift card for gas or other transportation.** This represents differences of interpretation concerning what’s allowable under WIF versus WIOA. Normally, incentives are only used with youth in the Oregon centers.

- **The amount of administrative fee going to the boards.** Some boards saw the expectations outlined in the MOUs as requiring more involvement than usual, and thus, asked for a higher fee for this program.

- **The method of hiring facilitators.** Three methods of hiring facilitators have been discussed. They include hiring from existing staff employed by the services vendor for the WorkSource center; seeking an independent consultant; or searching for a new person.

The timeline associated with the hiring process and resolution of the other remaining concerns is short as training is planned for December 2015 and the program is due to launch in January 2016. Underlying these questions is the newness of the working relationship between Incite and its fellow LWBs. Communication is occurring, but multiple conversations have been had to understand the different perspectives in play and where the potential for compromise lies. This demonstrates the need for two-way communication between Incite and its partners.

**Oregon Data System Modifications**

The WorkSource Oregon Management Information System (WOMIS) is the statewide platform for tracking WIOA services to adults, dislocated workers, and youth. This system is used to populate I-Trac, which in turn, is the management information system for workforce development programs in Oregon. WOMIS data for Rethinking participants will be migrated into a Rethinking-specific module in the I-Trac system. In recent months, the Incite team has completed work with Worksystems, Inc. staff—who oversee I-Trac—to develop the structure for the Rethinking module based on the data needs of the program and the evaluation. The module and its reporting functions are in the process of being built, and are expected to be delivered on schedule.

Examples of program elements that will be entered in the Rethinking module by facilitators include participant program application with signature, participant attendance per workshop, final scores on classroom-based assessment data, and hard
exits. The Incite team has scheduled a training for facilitators and evaluation staff on
the use of the Rethinking I-Trac module for the first week in December 2015.

Rethinking Job Search Outreach Pilot

One activity that was added to the work plan during the first year was a pilot test of the
proposed recruitment process. This was designed primarily to test two work readiness
assessment tools and the logistics for recruiting through UI. Other objectives were to
assess the response rate and identify the proportion of those who completed the
assessment who were also eligible for the program; this would help the team to develop
a plan for list management and outreach workflow.

Implementing the recruitment pilot necessitated close planning across the Incite team,
UI staff, evaluator, and assessment vendors. UI made the outreach communication task
work with their existing systems, and provided clarity on the level and nature of the
effort required on its part. The pilot test on the whole was implemented smoothly, and
netted over 900 responses within a few weeks. This was a pleasant surprise for all
involved. This provided the team with a good start for estimating the volume of
recruitment letters that will be needed when actual recruitment begins.

The pilot also helped the team finalize their selection of a work-readiness assessment
tool. Two instruments, previously used in different English-speaking countries, were
tested. After careful consideration, Incite chose for the full implementation the PARC
(Psychological Assessment of Readiness to Change) assessment, which is a proprietary
tool. Selection was based on the vendor being very responsive and supportive, and that
the scoring of responses was designed to permit a nuanced analysis to identify a
category of “inauthentic actors.” Aside from that category, the assessment tools needed
to be able to identify common Stages of Change: pre-contemplation, contemplation,
and action.

The evaluation team examined the results from each of the two work readiness tools,
and conducted a factor analysis to validate statistically that the instruments could
capture constructs of interest. Each tool was viable and had strengths. For example,
both PARC and Work Readiness Assessment (WRA) were written at under a 6th grade
reading level. The WRA was the stronger instrument in terms of netting a 27%
response rate, which was six percentage points higher than the PARC. Results from
each instrument were disappointing in that there was a smaller proportion of
individual that fit in the pre-contemplation stage than was expected of this population.
The factor analysis results showed that either instrument would be suitable for baseline assessment purposes. However, the factor analysis did not support the existence of four or five factors in the PARC instrument, only three, and therefore it is unlikely that the instrument would identify the desired “inauthentic actor” category of readiness. Factor analysis results are shown in the appendix.

Development of Program Materials

In addition to the year-one focus on establishing an effective process for reaching out to UI recipients and choosing a readiness assessment, the Incite team prepared additional outreach tools and refined the workshop curriculum. The project manager has led the effort to craft recruitment videos, which explain various aspects of the program and its study, and the development of a website for the Rethinking program that will serve as a hub for WorkSource customers to learn about the program. As the thinking about how to best communicate about the program with partners evolved, a login feature was added to the website plan that will allow staff to share information with one another and access program-related materials. A newsletter about the grant project’s evolution has also been issued several times during year one to partners.

One of the videos for the Rethinking program features the Incite project manager and a UI office representative speaking about the program. Although initially only the project manager was expected to speak, the Incite team realized the value of having UI involved as the intended audience was its customers. This step was appreciated by the UI leadership. It is also a clear demonstration of the partnership developing between the two organizations around the project.

The workshop curriculum was well-developed early in the project, having been attempted previously during the 2013 pilot. Incite’s Cognitive Behavioral Techniques Specialist (a member of the core project team) designed the program and developed all of the materials for the workshop using private and unrestricted funds. As early as February 2015, the curriculum had been organized into an instructor manual, with updates made from the previous series. The curriculum includes the following topics:

- How thoughts influence feelings and behavior
- “Risky” thinking and how to manage it
- Awareness of emotions and how to manage them
- Being accountable for action (or inaction) decisions
- Self-esteem awareness and building
- Personal responsibility and credibility
Goal-setting and prioritizing
Maintaining momentum

The key features of the instructional approach will include the following:

- Participant-driven, facilitated discussion
- Homework to encourage self-reflection
- Keeping a job search log and evaluation of those searches (three job search activities per week are required)
- Personal accountability for attendance and participation

Brief pre- and post-workshop assessments of knowledge related to the coursework have also been created by the specialist on Incite’s team; these will become sources of data on the gains in knowledge among the Rethinking participants. In total, the degree of preparation exhibited around the curriculum showed a strong commitment by Incite to deliver a carefully constructed, comprehensive program. Having so much of this work done early in the project freed time to focus on preparing for the training of facilitators, building a participant recruitment process, developing communication tools, and other tasks necessary for a launch of the Rethinking program in early 2016. The documented curriculum also better positions Incite and the evaluation team to monitor the fidelity of the program when applied across multiple WorkSource centers.

**Facilitator Hiring and Training Process**

The facilitator plays a critical role in the Rethinking program, as the key person who interacts with the participants, and delivers the curriculum. Given the content of the curriculum, it would optimally be delivered by a person who has highly developed skills in interpersonal communication, emotional intelligence, and resilience. They should also be skilled at workshop facilitation and be comfortable guiding participants to their own conclusions.

The Incite team developed a package of materials to support each site to find and engage a strong facilitator. These materials identified the requisite and desired skills, experience, and credentials for the facilitator role. They also developed guidance on a selection process and prepared a package of information to share with each site, which included example interview questions, an evaluation form, and a position skill description. As the facilitator’s will be employees or contractors of the sites, Incite was careful to not provide mandates that would override the agencies’ authority, but rather
to support an informed process, impart an understanding of the role, and demonstrate how skills and role tasks are aligned.

If the work plan timeline is to be met, hiring of facilitators must be completed by each site no later than December 1, 2015, so that training can commence prior to the January recruitment start. Sites have expressed some concern about the aggressive timeline given that they will not sign contracts with Incite before October 1. The Incite team has attempted to aid this process by having all the materials available earlier than October, as noted, and providing a window of opportunity for LWBs to become familiar with the guidance prior to formalizing the relationship with a contract.

The training for the future facilitators has been planned, and will be delivered over the course of one week, early in December. Facilitator directions have been embedded into each page of the curriculum (side by side with the workshop content). Speakers have been retained for the facilitator training, including an international cognitive behavioral expert who will present on the brain science behind the model. Speakers will be videotaped in case of facilitator turnover. Facilitators will take an emotional intelligence assessment as part of the training; this is not intended as a screening tool, but to help the facilitators prepare for their role. A bulk of the training will focus on delivering the Rethinking modules. After completing the in-person training, facilitators will complete a Cognitive Behavioral Therapy Group Facilitation Certificate. The facilitators will also be trained on confidentiality and the use of the I-Trac database.

In addition to the week-long immersion training, facilitators will be expected to attend quarterly webinars on topics to be determined by the Incite specialist based on the ongoing support/training needs identified in the fidelity assessments. The specialist has crafted a fidelity plan to ensure that the curriculum is delivered as intended. The program staff will conduct fidelity checks once a year at each site and will provide feedback to the facilitator immediately after the fidelity check to foster
professional growth.

The team has set up an appropriate plan to support sites to engage and retain high quality facilitators. This activity has included defining the requisite skills and a process for engagement/hire; developing intensive training; and planning to support the facilitators with quarterly webinars, annual trainings, onsite feedback, and monthly communications.
Conclusions and Recommendations

The research questions explored by the evaluation this year focused on understanding the elements of the Rethinking program, model fidelity, adherence to the project work plan and timeline, partner satisfaction, and strategies for collaboration and programming beyond the grant. As discussed in the previous pages, the evaluation team has seen progress in a positive direction in all of these areas. In particular, the first year of the Rethinking Job Search project saw tremendous progress in preparing for the launch of the program in January 2016. Some challenges occurred during the planning year. Nonetheless, the Incite team and its partners showed strong commitment to dissecting and tackling the steps needed to be ready for customers in a cohesive, collaborative manner. The Rethinking project is well-organized and has had good success to date when measured by multiple key implementation indicators: adequate staffing, partner buy-in, accomplishment of planning year tasks, and fitting into its environment while maintaining integrity of intent.

Challenges

The challenges to the project this year came from two corners: one from the national and state levels, and the other from Incite’s own desire to carefully construct its program with an eye to the future.

WIOA Implementation Alongside the Program Planning

The activation of components of WIOA during the summer of 2015 led Oregon, at a state level, to conduct strategic planning concerning its workforce system, which in turn led to some changes in the organization of its workforce board boundaries. By the fall of 2015, new boards had formed, some areas were rebranded, and new service vendors were in place. All of this proved a complex backdrop for the planning of the Rethinking program, particularly as the sites for the project were affected. While not all questions are answered nor all changes associated with WIOA completed yet, the project team has been working through the upsets in stride. If the contracts with the sites can be settled without delay and the remaining questions answered to everyone’s satisfaction, the program will be positioned to move into its implementation stage. It remains to be seen whether other aspects of WIOA will affect the project.
The Addition of an Outreach and Assessment Pilot to the Planning Process

The pilot conceived and conducted during the planning year was not part of the original work plan. However, it was thought to be a necessary undertaking after more than one strong assessment of cognitive readiness to search for work was identified. This activity meant additional effort from the project and evaluation teams, but resulted in a process and documents that will be used in the full-scale implementation of the Rethinking program, now with confidence that the UI outreach via letter can yield good response, the assessment offers factorial validity, and the data reporting system will be adequate to the needs of the evaluation. This step proved an excellent supplement to the planning year’s activities.

Successes

The Core Staffing Approach Worked Well

The Incite team was well-staffed with capable, determined personnel. The team works well together and has a problem-solving mindset. While they do possess a strong concept of the program, the team welcomes input from others. This approach to the project meant that the decision-making process was inclusive and productive. The work of the first year was also largely aligned with what was planned, on the expected timetable. The Incite team also fully cooperated with the evaluation team in developing the evaluation design.

The skill sets brought by the core team—curriculum design, training, communications, data systems, project management, etc.—has allowed the project to proceed smoothly. This configuration offers insights into what works well in achieving the many goals of a planning year for a project such as this. Notably, these individuals had not all previously worked together; one was brought into the Incite staff for this project and have been able to devote the time needed to plan thoroughly and well.

The Partnerships Are Off to a Strong Start

The interaction among the partners was also collegial and fruitful. Involvement of the UI office early in the project through input-gathering and executing the pilot over the summer kept that new partner with Incite engaged. This buy-in into the model and its premises brings the partners together.
Incite aims to engage the program partners consistently and meaningfully over the life of the project. This focus on inclusion has been balanced with a strong sense of direction for the project, although it has not been easy to achieve and will require ongoing effort. If able to be maintained, the partnership across LWBs and with the state UI and Employment Services offices could spur Oregon toward other system improvements.

Recommendations for Year Two

The Rethinking program is well on its way to a strong debut. However, to maintain this trajectory, the evaluation team suggests that Incite consider the following as the project enters its second year:

- **Increase the regularity and relevance of communications about the program with partners.** During the recent site visit, a need for additional two-way communication was raised by the partners. This was particularly a concern as the program is becoming more “real” and different staff will play roles in its implementation. Topics for discussion include the timing of requests and deliverables and high-level updates on the program’s progress, among others. The newsletter and the Rethinking website are two means for this communication, but semi-regular contacts and meetings would also be useful.

- **Strike a balance between the innovative nature of the project and the infrastructure and policies in place at the workforce boards.** The Rethinking model is a rare approach to assisting job seekers. Already the program has raised some questions about how its premise fits into the workforce system, and Incite should work to ensure that they take partner interests into consideration while also protecting the integrity of the program’s design. Tackling this challenge through the project may prove one of the most interesting aspects of the project for the field.

- **Monitor the quality of program implementation.** The work completed in year one positions the program well for fidelity across sites. However, the facilitators are not in place yet, and their success in delivering the curriculum could have a tremendous effect on the outcomes. The evaluation team has no doubts that Incite intends to closely monitor the quality of the program in the coming year, but raises it here as a reminder of the importance of this step. Conducting monitoring in a way sensitive to the sites’ needs will also be part of demonstrating true partnership with the centers and their boards; Incite may wish to open a discussion with the sites about the plans for the fidelity monitoring process.
• *Continue close coordination with the evaluation team.* The Incite team has moved aggressively to develop the program during year one. Through this process, the evaluation team was closely involved in discussions about data collection and sources, recruitment, and communications. Ensuring that continuation of this high level of dialogue between Incite and the evaluation team will be essential to a strong study as the circle of stakeholders expands to include facilitators and customers of the WorkSource centers.
Appendix A: Data Collection and Analysis

Data-Sharing Agreement

A cooperative agreement (No 15-267) was signed between Oregon Employment Department (OED) and Incite, Inc. This document provides Incite with access to OED information necessary for research and program improvement. It specifically acknowledges PPA’s role in assisting with grant-related work, and serves as a restricted-use data-sharing agreement for grant evaluation. In December 2015, two PPA project team members will be trained on the I-Trac database, and will agree to the confidentiality requirements for its use.

Primary Data Collection

Pilot: Assessments of Readiness for Job Search

Incite piloted a study to test the logistics and response rate to the proposed recruitment strategy for the Rethinking Job Search program. Two 12-item Stages of Change assessment tools—the WRA and the PARC—were implemented online between June 15, 2015 and July 21, 2015. PPA received data files containing the responses from 908 UI recipients who were randomly assigned to complete one of the assessment tools. PPA conducted a factor analysis on the data from both assessments. The factor analysis results were considered by the Incite team prior to their selection of the PARC as the readiness assessment tool. The scores will not be used in connection with the program enrollment or delivery, but are being captured to examine later in the evaluation as part of understanding whether the tool will be helpful to Oregon in a larger scale Rethinking program, when targeting the program to particular categories of job seekers may be beneficial.

The analysis for each data set—WRA and PARC assessment results—was conducted in the same manner. The first run of the factor procedure was open ended, letting the program identify the optimal number of factors. Another procedure was run asking specifically to find three factors. The choice of three factors was based on the WRA
theoretically consisting of three concepts; an unpublished PARC article that included factor analysis results showing that the instrument had three factors⁶; and the results of the open procedure. Table A-1 and Table A-2, below, show the results of PPA’s analysis of the pilot results for each assessment.

For WRA, the instrument items fit the theoretical concepts as anticipated. For PARC, most of the items fit the theoretical concepts as anticipated, but some items did not fit. A higher proportion of the variance of each item in WRA could be explained by the factors, compared to PARC. In other words, the factors explained most of the variability of responses, and so less of the variability was due to unobserved phenomena. On the other hand, the “action” and “pondering” categories in WRA were somewhat related to each other. Nonetheless, there were three distinct factors. PARC was a good choice in that each item was strongly related to only one factor; each concept was quite independent. PARC could not identify four or five strong factors as theorized, only three.

There were three items in PARC that did not belong with any factor (items 8, 10, 12). An examination of those items reinforces this finding (item 8 is too open to interpretation, 10 is too specific, 12 is an unlikely combination of pondering something highly specific). It is most likely that these three items would not be usable in a final analysis. Accordingly, there may not be an “unauthentic” category of readiness available from the instrument.

### Table A-1. Rotated Factor Matrix for WRA, Three Factor Request

<table>
<thead>
<tr>
<th>Items for each factor are shaded</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>Communalities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item 12 dropped</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total variance explained 69.8%</td>
<td>3.255</td>
<td>3.037</td>
<td>2.084</td>
<td></td>
</tr>
<tr>
<td>n= 401</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>q4r I am doing some work to improve on my job situation</td>
<td>.737</td>
<td>.316</td>
<td>.705</td>
<td></td>
</tr>
<tr>
<td>q8r I am really working hard to improve my job situation</td>
<td>.785</td>
<td>-.342</td>
<td>.814</td>
<td></td>
</tr>
<tr>
<td>q10r Anyone can talk about changing, but I'm actually doing something about my job situation</td>
<td>.755</td>
<td>.378</td>
<td>.778</td>
<td></td>
</tr>
<tr>
<td>q11r I am actively working towards improving my job situation</td>
<td>.821</td>
<td>.325</td>
<td>.847</td>
<td></td>
</tr>
<tr>
<td>q1r I think I might be ready for a change in my job situation</td>
<td></td>
<td>.808</td>
<td>.779</td>
<td></td>
</tr>
<tr>
<td>q2r It might be worthwhile to work on improving my job situation</td>
<td>.423</td>
<td>.706</td>
<td>.734</td>
<td></td>
</tr>
<tr>
<td>q5r I’ve been thinking that I might want to change something about my job situation</td>
<td>.399</td>
<td>.678</td>
<td>.699</td>
<td></td>
</tr>
<tr>
<td>q9r I have a problem with my job situation and I really think I should work at it</td>
<td>.604</td>
<td>-.356</td>
<td>.553</td>
<td></td>
</tr>
<tr>
<td>q3r There’s no problem with my job situation. It does not make much sense for me to be here</td>
<td></td>
<td>-.313</td>
<td>.694</td>
<td>.617</td>
</tr>
<tr>
<td>q6r I would rather spend my time somewhere else because I don’t feel I need to improve my job situation</td>
<td>-.353</td>
<td></td>
<td>.691</td>
<td>.638</td>
</tr>
<tr>
<td>q7r There’s nothing regarding my job situation that I really need to change</td>
<td></td>
<td>-.519</td>
<td>.527</td>
<td>.633</td>
</tr>
<tr>
<td>q12r I would rather cope with my present job situation than try to change it</td>
<td>-.359</td>
<td>-.479</td>
<td>.471</td>
<td>.580</td>
</tr>
<tr>
<td>Eigenvalue</td>
<td>3.255</td>
<td>3.037</td>
<td>2.084</td>
<td></td>
</tr>
</tbody>
</table>

Note: Loading values under 0.3 are suppressed.
Site Visit

A site visit was conducted over a day and a half in early October 2015. A two-person PPA team visited Salem, Oregon to speak with those involved in the planning for the Rethinking project. Interviews were conducted with leadership and staff during these visits about their current approaches to services and their expectations and needs heading into the program’s launch. In total, PPA staff spoke with 13 individuals from the three participating workforce areas, Incite, and the Oregon Employment Department’s Employment Services and Unemployment Insurance offices. Data from the site visits were documented in a site visit summary report, which was delivered to Incite on November 6, 2015.

### Table A-2. Rotated Factor Matrix for PARC, Three Factor Request

<table>
<thead>
<tr>
<th>Items for each factor are shaded</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>Communalities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Items 8,10,12 do not fit any factor well</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total variance explained 44.6%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>n=389</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>q3r I am actively looking for a job</td>
<td>.848</td>
<td></td>
<td>.776</td>
<td></td>
</tr>
<tr>
<td>q5r I am following up on job leads</td>
<td>.780</td>
<td>-.324</td>
<td>.741</td>
<td></td>
</tr>
<tr>
<td>q7r I am really working hard to find a job</td>
<td>.739</td>
<td></td>
<td>.649</td>
<td></td>
</tr>
<tr>
<td>q2r If I were to find a job it would disrupt my family life and I can’t let that happen</td>
<td></td>
<td>.687</td>
<td></td>
<td>.540</td>
</tr>
<tr>
<td>q6r If I change from the type of work I was doing, people will think I failed and that is too much for me to take right now</td>
<td></td>
<td>.538</td>
<td></td>
<td>.316</td>
</tr>
<tr>
<td>q9r I believe that I might be worse off financially if I start employment</td>
<td></td>
<td>.590</td>
<td></td>
<td>.382</td>
</tr>
<tr>
<td>q11r I don’t understand why I need to look for a job</td>
<td></td>
<td>.601</td>
<td></td>
<td>.482</td>
</tr>
<tr>
<td>q1r I am considering my career interests and vocational goals</td>
<td></td>
<td></td>
<td>.638</td>
<td>.463</td>
</tr>
<tr>
<td>q4r I have started to consider my career and employment options</td>
<td></td>
<td></td>
<td>.673</td>
<td>.567</td>
</tr>
<tr>
<td>q8r Maybe the WorkSource Center will be able to assist me</td>
<td></td>
<td></td>
<td></td>
<td>.078</td>
</tr>
<tr>
<td>q10r I am in the process of setting up interviews with employers</td>
<td></td>
<td>.453</td>
<td></td>
<td>.251</td>
</tr>
<tr>
<td>q12r I am considering enrolling in a training or educational program</td>
<td></td>
<td></td>
<td></td>
<td>.107</td>
</tr>
<tr>
<td>Eigenvalue</td>
<td>2.336</td>
<td>1.794</td>
<td>1.223</td>
<td></td>
</tr>
</tbody>
</table>

Note: Loading values under 0.3 are suppressed.
Primary data files were reviewed, coded, and analyzed in preparation for the site visit summary report and this annual report. Preliminary findings were shared with the project team in monthly update reports and via conference calls.

### Secondary Data Collection

**Administrative Records**

PPA has received and reviewed nearly 50 administrative documents from Incite, which include information on:

- Evidence base/literature review
- Program background
- Program planning and implementation reports
- Rethinking facilitators training materials
- Rethinking curriculum
- Logic model and flow chart of participation
- Fidelity plan

The Incite project manager and other staff shared these materials with PPA as they were developed. Materials were reviewed and considered in conjunction with the primary data collected. Questions were raised with Incite staff as needed. No data from the I-Trac system were retrieved during the year since enrollment of participants and the comparison group will not start until January 2016. PPA staff will have direct access to the I-Trac system for data extracts.

### Cost Study Data Collection

PPA worked with Incite’s Project Manager and Director of Finance to develop a plan for how cost data would be collected for the Rethinking program and for the standard adult and dislocated worker services as a comparative. An Excel file was shared by Incite, which reflected their subcontractor reporting requirements. This was proposed as the starting point for discussion of the data elements to be reported by the centers.

The evaluation design report had proposed calculating a cost-effectiveness analysis (CEA) and a partial cost-benefit analysis (CBA) by comparing program costs in year 4 to a baseline in year 1. This was done based on the assumption that the Rethinking program costs would be a part of the Adult and Dislocated Worker programs.
However, as part of the discussions with Incite, PPA learned that the Rethinking program would have its own accounting code and can instead be calculated as an “over-and-above” cost compared to the adult and dislocated worker programs.

This is an important distinction because while expenditures in the final year of delivery (year four) will be parsed out according to the proposed reporting requirements, not all centers can report year-one expenditures in this manner. It is currently under discussion whether to pursue a baseline data collection since a CEA and partial CBA can be accurately calculated using data only from year four. Yet, the baseline data—even limited to totals per center—can still inform the discussion of scalability and sustainability.

The remaining task for this year is to develop a data collection tool to capture the one-time start-up costs in year two. These are costs that are incurred to get the program up and running (e.g., hiring additional staff, acquiring additional space, setup of website materials, etc.), but not as a continuing service. Such expenditures would not be easy to identify within the accounting system and need to be hand-tallied by centers as they occur.