

Summary of the Evaluation of The California Wellness Foundation's Work and Health Initiative

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The mission of the Work and Health Initiative (WHI) funded by The California Wellness Foundation (TCWF) was to improve the health of Californians by funding employment-related interventions. Fundamental to this Initiative was the perspective that important relationships between work and health are shaped by an evolving California economy. The goals of the Initiative were (1) to understand the rapidly changing nature of work and its effects on the health of Californians; (2) to increase access to high quality employment for all Californians; (3) to improve conditions of work for employed Californians; and (4) to expand the availability of worksite health programs and benefits.

To accomplish these goals, TCWF funded four programs comprised of over forty partner organizations working together to improve the well-being of Californians through approaches related to employment (see Brousseau & Corral Pena, 2002; Donaldson, Gooler, & Weiss, 1988; Donaldson & Weiss, 1988). The Future of Work and Health (FWH) and the Health Insurance Policy Programs (HIPP) were expansive and comprehensive research programs designed to generate and disseminate knowledge of how the nature of work is being transformed and how that change will affect the health and well-being of Californians. In the HIPP, current statewide trends related to health and health insurance within California were examined through extensive survey research on an annual basis. In the FWH program, researchers throughout California examined the changing nature of work and health and identified some implications for improving working conditions and lowering employment risks.

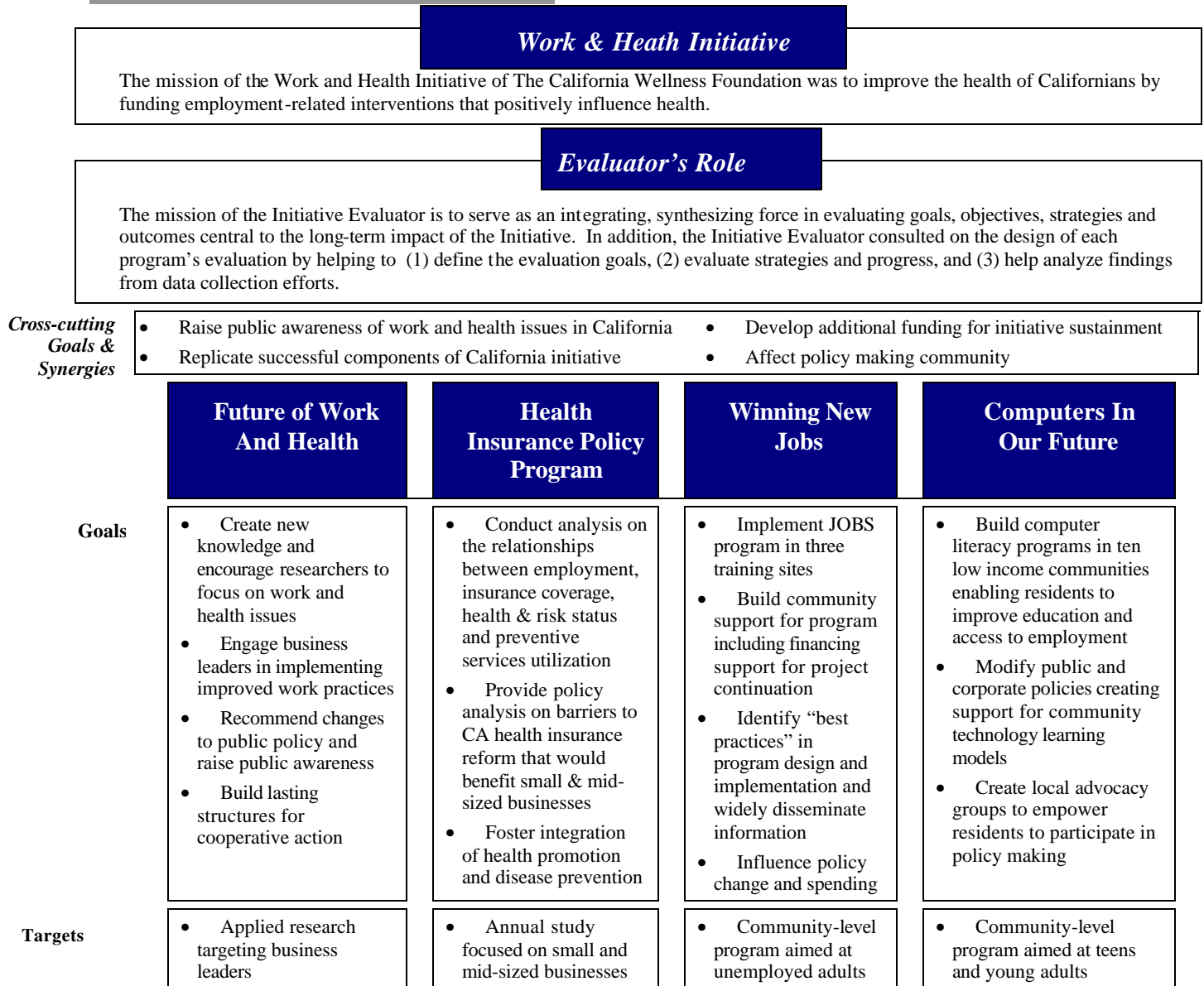
The Initiative also included two demonstration programs in 17 sites throughout the state to assist both youth and adults in building job skills and finding employment. The Winning New Jobs (WNJ) program aimed to help workers regain employment lost due to downsizing, reengineering, and other factors driving rather dramatic changes in the California workplace, and thereby put an end to the adverse health consequences that most workers experience as a result of unemployment. Finally, the Computers in Our Future (CIOF) program aimed to enable youth and young adults from low-income communities to learn computer skills to improve their education and employment opportunities—thereby improving their own future health as well as the health and well-being of their families and communities.

Evaluation Approach

Systematic program evaluation was used to guide the strategic management of each program in the Initiative, as well as to inform the entire Initiative. Our evaluation team, Claremont Graduate University (CGU), was awarded the grant to evaluate the Initiative. Our role was to serve as an integrating, synthesizing force in evaluating goals,

objectives, strategies, outcomes, and impact of the Initiative. We identified cross-cutting goals and synergies, worked to enhance these goals, and used evaluation progress reports to maximize the overall impact of the Initiative. In addition, CGU developed evaluation systems that provided responsive evaluation data for each program. Those data were used to continually improve program effectiveness as well as to evaluate impact. Figure 1 illustrates the initial conceptual framework that was developed by CGU in collaboration with key stakeholders to summarize this complex effort.

Figure 1: Overview of the Initiative



To ensure that the perspectives and problem-solving needs of those with a vested interest in the Initiative programs (e.g., TCWF, grantees, program administrators, staff, and program recipients), collectively known as stakeholders, were understood and addressed, the evaluation team adopted a participatory theory-driven evaluation approach (Donaldson, 2001a, 2002; Donaldson & Scriven, 2002). Key objectives of this approach were to empower stakeholders to be successful, facilitate continuous program learning, assist with ongoing problem solving efforts, and to facilitate improvement at as many levels as possible throughout the life of the Initiative (see Donaldson, 2002). Decisions about evaluation design, goal setting, data collection, program monitoring, data analysis, report development and dissemination were highly collaborative.

The participatory theory-driven approach rested on developing program theories for each program and using evaluation data to guide program development and implementation. Program theory was defined as a sensible and plausible model of how a program is presumed to reach its desired outcomes (Donaldson, 2001a, 2002). Each program theory was developed collaboratively and was based on the stakeholders' views and experiences, prior evaluation and research findings, and more general theoretical and empirical work related to the phenomena under investigation (cf. Donaldson, 2001a; Donaldson, Street, Sussman, & Tobler, 2001). Such frameworks provided a guiding model around which evaluation designs were developed to specifically answer key evaluation questions as rigorously as possible given the practical constraints of the evaluation context.

Data Collection

Data collection efforts were based on the premise that no single data source is likely to be bias-free or a completely accurate representation of reality. In general, we followed the tenets of critical multiplism (Cook, 1985; Donaldson, 1995; Shadish, 1993). Evaluation plans were designed to specifically encourage each grantee to utilize multiple data collection strategies with different strengths and weaknesses. A special effort was made to understand cultural and language concerns so that the methodologies employed yielded accurate data. In addition to evaluating program outcomes, impact, and potential side effects, evaluative efforts were both formative (i.e., aimed at developing and improving programs from an early stage) and process-oriented (i.e., geared toward understanding how a program achieves what it does over time).

Formative Evaluation Tools

To support continuous program improvement throughout the life of the Initiative, the Claremont Graduate University (CGU) evaluation team:

- Provided mid-year evaluation reports
- Facilitated mid-year conference calls to discuss program evaluation findings and recommendations with grantees and TCWF program officers
- Provided year end evaluation reports
- Facilitated year end conference calls to discuss program evaluation findings and recommendations with grantees and TCWF program officers; and
- Provided grantees an opportunity to evaluate the TCWF program officers and

CGU evaluators on an annual basis. In addition, these efforts were supplemented with several interim evaluation reports and frequent communications with grantees and the TCWF program officers to provide timely feedback based on evaluation data collected throughout the year.

Summative Evaluation

The CGU evaluation team collected and analyzed extensive quantitative and qualitative data pertaining to the impact of the Work Health Initiative (WHI). Approximately 200 evaluation reports were written and provided to grantees and/or TCWF throughout the life of the Initiative. In an effort to determine the most useful format and content for the final summative evaluation report, CGU initiated several discussions with the Foundation. As a result of those discussions, CGU wrote the final report to conform to the following guidelines:

- The main purpose of the report was to provide a summary of evaluation findings and conclusions in a relatively brief manner
- Qualitative as well as quantitative findings were presented; and
- The report reflects CGU's candid evaluation of the WHI from an external evaluation perspective, and does not necessarily reflect the views of the grantees or TCWF staff involved with the project.

At the request of the Foundation, CGU offered to provide copies of supporting documents, previous evaluation reports, data tables, or conduct additional data analyses to justify or expand upon findings and conclusions presented in the summative report. CGU also provided summative evaluation reports for each program to the appropriate grantees, and continues to produce and disseminate public documents describing key findings and lessons learned from the Work Health Initiative (e.g., Donaldson & Gooler, 2002a, 2002b, in press; Fitzpatrick, in press).

Winning New Jobs

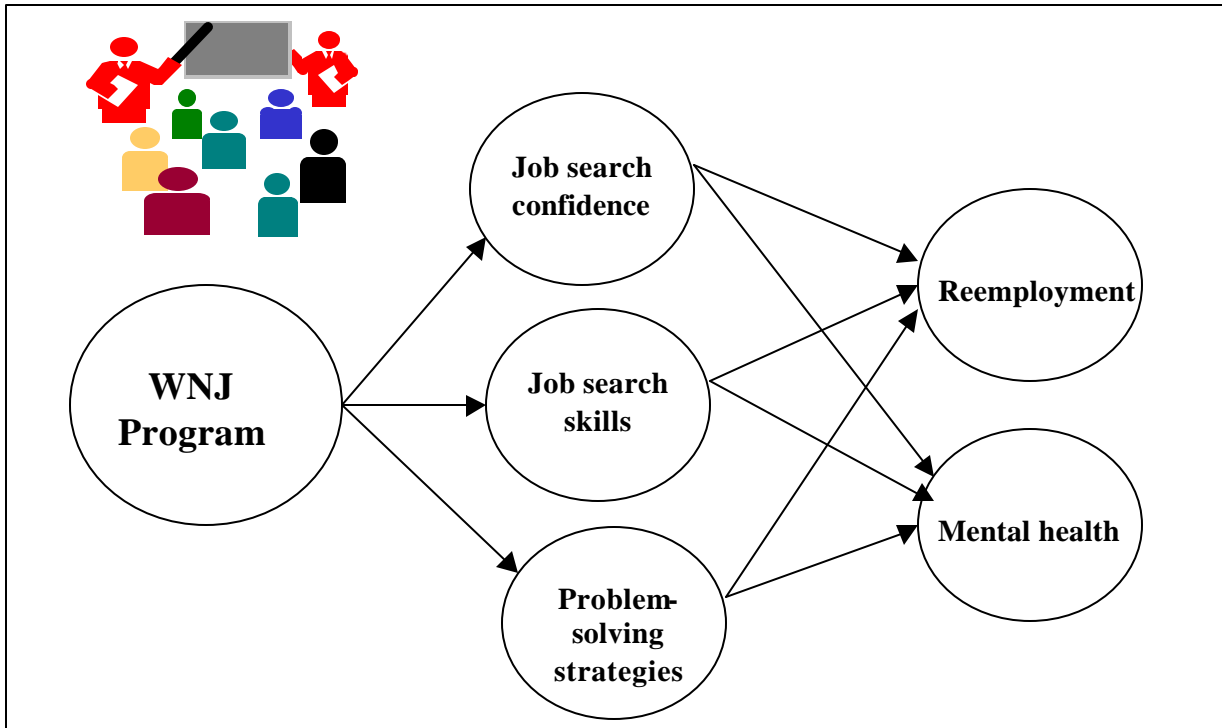
Program Description

The original mission of Winning New Jobs WNJ was to provide job search training to 10,000 unemployed and underemployed Californians over a four-year funding period. This project was based on a theory-based intervention, JOBS, which was developed and initially tested via randomized trial in Michigan (Price, vanRyn, & Vinokur, 1992; Vinokur, Price, Caplan, vanRyan, & Curran, 1995; Vinokur, vanRyan, Gramlich, & Price, 1991). To accomplish these goals, systematic organizational readiness assessments were used to select three unique organizations in three diverse California communities to implement WNJ (cf. Donaldson, Gooler, & Weiss, 1998).

The core program theory used to guide the evaluation of WNJ is shown in Figure 2. Participants attended a one-week, half-day workshop designed to improve job search self-confidence, job search skills, and problem solving strategies including inoculation against setbacks (i.e., expectations of setbacks). These skills and psychological factors were presumed to facilitate reemployment and improve mental health. Furthermore, the WNJ program was hypothesized to have impacts at multiple levels: participant (e.g., increased job search self-efficacy and re-employment), organization (e.g., staff skill development, reputation enhancement), community (e.g., increased access to job search

services), and the policy environment (e.g., financial support for the continuation of the program).

Figure 2: Winning New Jobs Program Theory



WNJ Evaluation Questions

Using the core program theory shown in Figure 2, a rather extensive process consisting of several meetings, phone and electronic discussions, and document submission and revisions with program stakeholders was used to develop and prioritize evaluation questions. This same type of collaborative process was used to decide how to allocate resources for data collection. In summary, given resource and other practical constraints, compromises were required to decide which evaluation questions to answer and how to answer them. It is important to note that the final evaluation design did not focus on some of the hypothesized relationships (e.g., links to mental health outcomes).

The core evaluation questions included:

1. Program Implementation. Can the Michigan JOBS program be implemented in different types of service organizations in California? What does implementation look like? What are the key challenges and success factors to implementation?
2. Program Service. Whom are the sites serving (e.g., population characteristics of service recipients)? How many people are served at each site?
3. Short-term Outcomes. Does WNJ increase people's confidence in their ability to use their newly acquired/enhanced job seeking skills?
4. Reemployment Outcomes. Do people find employment? And, what does their employment situation look like?

5. Program Sustainability and Replication. Does WNJ generate resources for program sustainability beyond the life of the grant? Do other California organizations learn about and adopt the WNJ model?

Data Collected to Answer WNJ Evaluation Questions

To address these questions, extensive standardized eligibility, demographic, pre-test, post-test, and employment follow-up data were collected at each site. Overall, data were collected for over 5,100 individuals, including eligibility, demographic and pre-test data for 4,960 individuals, posttest data for 3,684 individuals, and employment follow-up forms for 3,476 individuals who completed the workshop. These response rates were considered adequate for the nature of the program and types of analyses conducted. In addition to these data, various types of qualitative implementation and outcome data were collected. Further, databases tracking participants in other parts of the country and world were available for comparison purposes. This collection of databases was used for both formative and summative evaluation of the WNJ program.

Summary of Key Findings

- ❑ The Michigan JOBS program was successfully implemented in three different types of employment services agencies in California as WNJ. Serving diverse populations in different geographical regions, these organizations implemented the WNJ curriculum with only minor adaptations. Participants felt that the behaviors of facilitators and the group dynamics during training sessions were consistent with those targeted in the WNJ model.
- ❑ Several factors appeared to contribute to the successful implementation of the JOBS model, including: (1) extensive training of program staff in the WNJ model and facilitation protocol, (2) strong involvement of the program management team, (3) active monitoring of deviations from recruiting and training protocols by the sites and program management team, (4) refresher training sessions, and (5) continuous improvement feedback from the evaluation team.
- ❑ The three WNJ sites served 5,290 unemployed or underemployed Californians in 455 WNJ workshops over a four-year period. WNJ program sites served a very diverse population of Californians in terms of ethnicity, age, educational background, and employment history. Nearly two-thirds (60%) of WNJ participants were female; more than two-thirds (68.4%) were people of color; more than two-fifths were over 40 years of age (41%); and nearly half held a high school degree or had fewer years of formal education (44.8%).
- ❑ The preponderance of the available evidence indicates that WNJ participants experienced significant improvements in job search self-efficacy, self-mastery, confidence to handle setbacks, and expectations of employment setbacks.

- ❑ Approximately 65% of all WNJ completers reported becoming reemployed 180 days after the workshop. Reemployment rates differed by site, ranging from 55% to 75%.
- ❑ Although all three sites committed to institutionalize WNJ in whole or in part during their funding period, only one WNJ site continued to offer WNJ workshops as part of its standard service array. A relatively small number of service organizations have delivered WNJ workshops to their local constituents.

Considerations for Future Programming

Workforce Preparation and Basic Skill Levels. While the WNJ program is designed to enhance such things as an unemployed persons' self-esteem, confidence, job-search skills and self-efficacy, the lack of job-specific competencies appear to be a substantial barrier for many California job seekers. The lack of basic skills of many entry-level employees is generally a well-known challenge facing California employers. In many ways, the California working population is becoming increasingly mismatched with the needs of employers. The skills that many employers feel are lacking in a large proportion of new hires include basic arithmetic, computational skills, and English literacy. The problem is particularly acute among immigrant workers, who in some cases may be illiterate in their native language as well as in English.

Removing Additional Employment Obstacles Prior to WNJ. Findings from WNJ suggest that some key employment obstacles are difficult or impossible to address in a five-day motivational workshop. These are, for example, skill-related obstacles (lack of skills/overqualified), workplace expectations (i.e., "fit" issues with respect to work schedules, salaries, skills), negative employment histories, discrimination issues, criminal records, physical appearance (e.g., tattoos), and a lack of resources such as transportation, child care, or health care. This suggests that the success of the WNJ curriculum may be dramatically enhanced by other services that remove non-motivational obstacles prior to the five-day workshop. Based on interview data, one site now appears to be using this approach. More specifically, prior to participating in WNJ, clients identify and address a variety of employment obstacles (e.g., obtaining a drivers license, building job skills).

Clarifying Program Sustainability and Replication Expectations. In WNJ, feedback from grantees revealed that some felt pressured to disseminate and replicate the program at the same time they were struggling to obtain support from their own top management with respect to institutionalizing the WNJ program. There was also some confusion by sites with respect to roles and responsibilities for disseminating and replicating the program. Although it was clearly a grant requirement, this did not occur until mid-way into the funding period. Feedback from grantees suggested that due to the complexity and importance of achieving these goals, these efforts would have been more successful if they were clarified and addressed early on and throughout the project.

Demonstrating WNJ is Better than Existing Programs. Site leaders reported that it was difficult to articulate and demonstrate the value added by WNJ in comparison to other available job placement/training programs. In fact, it was reported that some of the administrators in the site organizations believed WNJ was less effective than some of their existing services. This impression seemed to be based on unfair comparisons of (1) WNJ reemployment rates to other program rates that were calculated differently, and (2) WNJ to more costly programs of much greater length. In some cases, this appeared to make it difficult to secure internal organizational commitment to make WNJ a core

service, and to secure alternative funds to continue service beyond the grant period. This challenge could be addressed in future programming by developing strategies for directly examining and understanding differences between a new program and the best alternative program currently implemented at a site.

Computers in Our Future

Program Description

The second demonstration program, CIOF, created fourteen Community Computing Centers (CCC's) in eleven low-income California Communities. The CCCs were designed to demonstrate innovative, creative, and culturally sensitive strategies for using computer technology to meet the economic, educational, and development needs of their local communities. The CIOF program attempted to explore and demonstrate ways in which CCCs can prepare youth and young adults ages 14 through 23 to use computers to improve their educational and employment opportunities, thereby improving the health and well-being of themselves, their families, and their communities.

Organizational readiness criteria were used to select eleven diverse California organizations from among over 400 applicants to accomplish these goals over a four-year period. These organizations are diverse with respect to organizational type, geographical location, and populations served. Three organizations were also funded by TCWF to facilitate program development and offer program management and technical assistance to the 14 sites. Together, each site was to develop a program to address each of ten broad program goals outlined in the CIOF Program Model and presented in Table 1.

Collectively, the CIOF centers provided access to more than 200 computer workstations statewide. With respect to open access service goals, the sites collectively provided unrestricted open access to 27,705 Californians (approximately 6,900 individuals per year, state-wide) and provided technology training and work experiences to over 4,300 youth and young adults over the four-year program period.

With extensive input from site leaders, TCWF program officers, and the CIOF Program Coordination Team, the CGU Evaluation Team constructed a guiding program theory of how the CIOF program is presumed to work. Figure 3 shows that participation in the CIOF program is believed to lead to improved attitudes toward computers, technology skills, career development knowledge, job search skills, and basic life skills. These acquired skills and knowledge are presumed to facilitate the pursuit of more education, internship opportunities, and better employment options, which in the long-term will improve participants' health status.

This conceptualization of the CIOF program was used to develop and prioritize evaluation questions that were agreed upon by program stakeholders. More specifically, during the earliest phase of program implementation, leaders from the Program Coordination Team (PCT) and TCWF Program Officers, as well as leaders from each of the CIOF CCCs and CGU agreed on four core areas that the evaluation would address. Evaluation resources would subsequently be implemented to answer core questions in these four areas: program implementation, program service, program impact, and strengths and weaknesses of the CIOF model. These questions were also used to guide data collection and reporting efforts.

Table 1: CIOF Program Goals

CREATE CENTER: Build eleven Community Computing Centers (CCCs) which emphasize each of the CIOF Program Model components.

ACCESS: Increase access to computer technology and training and offer periods of largely unrestricted use of computers to low-income residents in the local community who would otherwise lack access to computer technology.

EDUCATION AND SKILLS TRAINING: Develop a raised standard of education and training in computer literacy and other areas of technology competence and skills critical to success in employment for youth and young adults ages 14-23.

LINKAGES WITH EMPLOYERS AND JOBS: Establish and enhance linkages with employers and jobs in the local community for computer literate youth and young adults ages 14-23 to improve their chances for competing effectively for employment and to support them in transitioning to the world of work.

STATEWIDE NETWORK: Participate in mutually beneficial collaborative learning and sharing relationships among the leaders of the eleven CCCs.

EVALUATION: Throughout the funding period, centers will collect data regarding participation of youth and local residents as well as program outcomes and impacts in order to continually evaluate progress toward their stated objectives. Centers will work with the Initiative Evaluators and the Coordination Team to ensure progress toward program and CIOF goals.

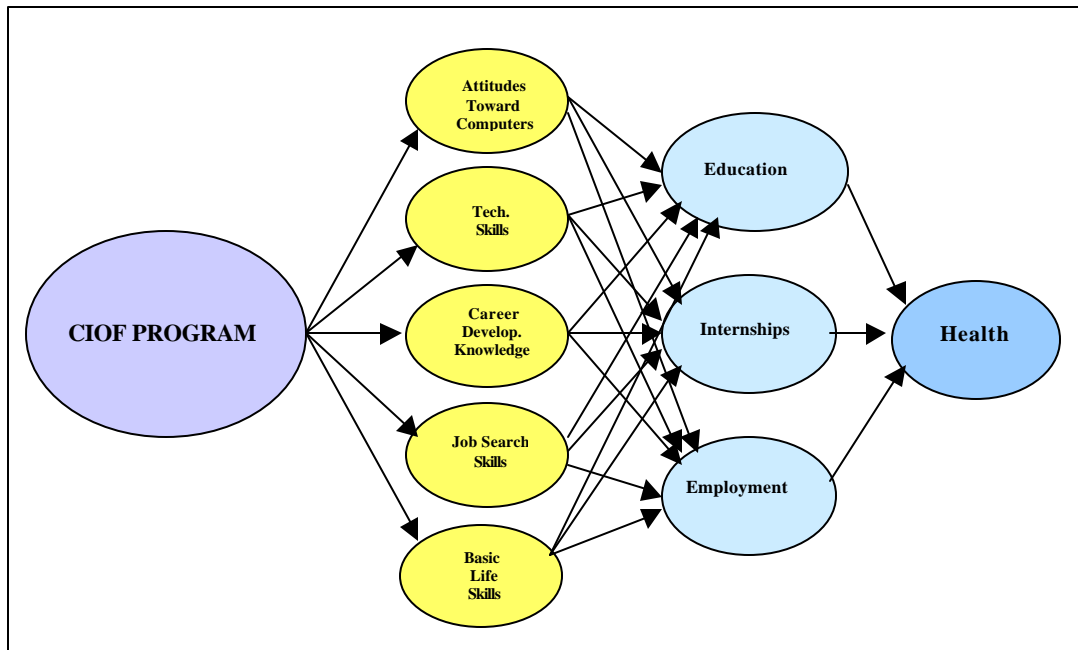
COMMUNITY VOICE: Formalize the establishment of a broadly representative CommTAC whose members will build support for the center's work, and assist in advocating for local positions and policies that ensure equitable technology access for low-income communities.

COMMUNITY TECHNOLOGY RESOURCE: Have linkages to, share expertise with, and serve as a technology resource for community-based organizations, schools, businesses, and individuals.

POLICY DEVELOPMENT: Identify, promote, and achieve local, regional, and/or statewide policy reforms that result in improved access to computer technology for people living in low-income communities.

DISSEMINATION: Serve as a role model to others by disseminating lessons learned, success stories, as well as helping to educate others on the importance of access to technology, and technology education and training for people in low-income community areas.

Figure 3: Computers In Our Future



1. Program Implementation. What does it take to set up a vibrant, accessible, relevant, and sustainable community computing center? What does implementation look like? What are the key challenges and success factors to program development and implementation?
2. Program Service. Whom are the sites serving (e.g., population characteristics of service recipients)? How many people are served at each site?
3. Program Impact. What is the impact of the CIOF program on the eleven sites, their participants, and their communities?
 - a) How do technology access and training improve the employment prospects of young people?
 - b) What are realistic outcomes in increased computer or technical skills, employment, increased literacy, English acquisition, attainment of GED or other educational targets?
 - c) How does the center affect the participants personally (e.g., self-confidence, motivation, life skills)?
 - d) What are the demonstrable payoffs to communities (e.g., increased cohesion, access to technology resources and services, etc.)?
4. Strengths & Weaknesses of the CIOF Model. What are the strengths and weaknesses of the specific CIOF models at each of the CCCs (i.e., access, education, resource, voice, all with a focus on employment and youth)?

Data Collected to Answer CIOF Evaluation Questions

To answer these questions, extensive standardized demographic, center utilization, pre-test, post-test, and follow-up data were collected from each site. Various types of qualitative implementation and outcome data were also collected.

Overall, data were collected for over 25,000 program participants, including user data (demographic and background) for 22,729 individuals, center usage data (daily activities and time spent at center) for 12,049 individuals, pre-test and post-test data for over 400 individuals, and follow-up interview data for over 200 individuals. Both user and usage data were collected for nearly half (47%) of all individuals tracked. Data collected with these measures included demographic and background data, computer-related behaviors inside and outside the CIOF centers, attitudes toward computers, computer skills, reactions to the CIOF centers, and educational and employment outcomes. These data are limited in similar ways to the WNJ data (e.g., one group, pretest-posttest research design) when they are used to estimate program impact. However, various types of qualitative implementation and outcome data were also collected, including site visit observations and interview data from site leaders and program coordination team members. In addition, more than eighty site progress reports and eight progress reports from the PCT were analyzed for key accomplishments and lessons learned.

Evaluation Data and Continuous Program Improvement Efforts

To support continuous program improvement within the CIOF implementation sites throughout the life of the Initiative, CGU prepared and disseminated 113 evaluation reports to CIOF program leaders, PCT members, and TCWF over the five-year funding period. These included five year-end evaluation reports, four mid-year evaluation reports, 92 site reports, four interim reports, and eight miscellaneous evaluation reports to

program grantees. As tools for program monitoring and improvement, these reports documented not only key accomplishments and program activities, but also key program challenges and recommendations for addressing challenges. Conference calls and/or face to face meetings were held with site leaders, the PCT, and TCWF to discuss each report. In addition, CGU presented key findings and updates on statewide service statistics at each of the biannual CIOF statewide conferences. During these various communications, CGU facilitated discussion on the meaning of the findings and on developing strategies and responses to addressing program recommendations.

Several evaluation tools were also created and disseminated to sites to support evaluation and program capacity building. In addition to their evaluation plans, each site received an evaluation procedures manual which served as a centralized resource for storing evaluation materials such as evaluation planning materials, evaluation communications, draft and finalized measures, evaluation feedback reports, sample technology and portfolio evaluation measures from mainstream efforts, and evaluation training materials prepared by CGU. Overall, pre-test and post-test measures were created to measure skill gains for more than forty different classes across the CIOF network. A key resource initially created by PCT and developed and supported by CGU over time with extensive input from site leaders, was the CIOF Client Tracking System (CCTS). The CCTS is a Microsoft Access-based database that tracks client demographic, background and center usage data. As a tool for program improvement, CGU designed extensive reporting capabilities into the CCTS to enable program leaders access to program service statistics for convenient and timely reporting and dissemination purposes. CGU created a companion training and user manual to assist sites in understanding and maintaining this client tracking system.

Summary of Key Findings

- ❑ A combined total of 25,036 Californians participated in the fourteen CCCs over the four year period. Based on systematic tracking data, sites reached 44.4% (n=12,293) of their combined open access service goal of 27,705. In addition, they reached 69.8% (n=3,418) of their youth training goal of 4,900 for 14-23 year olds, and 15.1% (n=648) of their youth employment and work experience goal of 4,300 for 14-23 year olds. It is important to note that tracking data were not collected for the entire grant period and that youth employment goals were de-emphasized by the foundation about midway through the grant.
- ❑ Center participants visited their CIOF center an average of 10 times and spent an average of 1 hour 28 minutes per visit. Overall, center users logged approximately 250,000 visits and more than 370,000 hours of use across the CIOF network of centers.
- ❑ More than half (52.9%) of CIOF participants were female, more than three-fourths (78.4%) were people of color.
- ❑ More than one-third (37%) of all individuals served were youth and young adults in the target age range of 14-23 years. This is more than twice the proportion of the

California population aged 14-24 years (15.7%).¹ Most sites served predominantly adult populations. In part, this was due to a higher than expected demand for access and training by adults. In contrast, only one site (a youth organization) served more than two thirds who were 14-23, and four sites served populations where nearly half were 14-23 year olds. Feedback from grantees suggest that key challenges to attracting the target population included developing youth outreach strategies and youth-relevant programming.

- ❑ Factors that contributed to meeting program service goals included: (1) location and visibility to target population, (2) top management support in centers, (3) developing curricula relevant to the lives of youth, (4) knowledge and understanding of populations served, and (5) tailoring center hours and scheduling to needs of the target population. Word-of-mouth referral was the most effective form of recruitment in most centers.
- ❑ Building computer technology literacy was a central goal of CIOF programs. Developing curriculum and technology training programs, however, proved to be much more challenging for program leaders than anticipated. Contrary to expectation, it took most sites up to three years to develop program learning objectives. In part, this was due to centers' initial focus on developing centers and open access periods. However, there were also numerous obstacles to overcome in order to develop programming in this area.
- ❑ Most programming around employment linkages centered on skill building and employment preparation. Centers viewed successful educational attainment as a priority for ensuring improved employment opportunities for the target population. Developing employment linkages was very challenging for centers. Most program stakeholders lacked appropriate experience, knowledge, and/or resources to create solid programming around job development, placement, and tracking employment outcomes.
- ❑ More than four-fifths of responding participants (81.9%) felt their educational opportunities had improved as a result of CIOF. The key ways in which they benefited were in being able to do homework, school projects and research at the centers (25.4%), improving performance at school (19.9%), enhancing their motivation to continue or do better in school (16.9%), and developing basic skills that help in school, such as typing. A few respondents (2.5%) said they were able to take or pass the GED as a result of using their CIOF center.
- ❑ The key ways in which respondents benefited personally included changing their attitudes toward computers (31.5%), gaining new computer knowledge and skills (28.5%), gaining new employment and job-related benefits (26%), being able to use and apply computer skills (18%), and changing their outlook and/or aspirations (13.5%). Other benefits included internet and email, personal life benefits, helping others, enjoying the center, educational benefits, and improving basic skills.

¹ Source: Census 2000 Summary File 1 [machine-readable data file]/prepared by the U.S. Census Bureau, 2001. Produced by the California Census Data Center. August 2, 2001.

- ❑ Above and beyond having access to hardware and software (21.7%), respondents said that having access to staff and instructors (33%) was the key resource they received from their CIOF centers. Other factors that respondents said their centers provided that they could not get elsewhere included: Internet access (18.5%), access to more or better programs (18.5%), and a caring center environment (18.5%). Additional resources were access to more peripherals (7.6%), convenient schedules and location (7.6%), and classes and training (7.6%).
- ❑ In addition to providing access to computers and training in technology, other key resources developed by CIOF centers included the CIOF Policy Agenda, CIOF newsletters, CIOF website, and CIOF toolkits. Each of these serves to inform those interested in community technology about lessons learned, key activities of the centers and policy implications for community technology centers. Furthermore, these resources are made available to the public at no cost.

Considerations for Future Programming

Professional Program Planning and Development Assistance. Most center leaders did not recognize the value of developing and having a technology training plan until their programs were in place. In many cases, they were not able to identify existing and anticipated community needs and resources. For example, key challenges were identifying how technology training fit into their larger organizational goals, how to integrate new program efforts with existing activities, and how to achieve program goals that required new expertise (e.g., job placement). One implication of these findings is that substantial support for professional assistance in program planning and development may be necessary for centers to overcome key challenges in a timely manner. Minimizing geographical distance between technical assistance providers and grantees is also important. Feedback from grantees suggest that providing mechanisms to identify and link grantees to local service providers may be beneficial. In addition, different models that allow for greater flexibility for provision of professional program planning and developmental assistance may be necessary depending on specific needs of grantees.

Facilitate Strong Program Leadership. Program leaders often struggled with what they felt were unclear program expectations from TCWF. This was due, in part, to how TCWF structured the grant. More specifically, feedback from grantees revealed that they were uncomfortable with the lack of predetermined standards for what they were funded to accomplish. There was a general discomfort with relying on their own expertise to make decisions in developing their innovative programs. Although there was general agreement that center leaders and staff usually knew best whom they wanted to serve, what they wanted to achieve, and how the use of technology would make that happen, they still desired and needed advice and direction. In the case of CIOF, there was a learning curve that sites needed to go through to understand and accept this role responsibility. Program coordination team members, in turn, also learned the importance of providing support and appropriate levels of direction and guidance. Opportunities to meet and talk with others dealing with these concerns were reported to be helpful by grantees.

Provide Core Curriculum Modules. Many CIOF sites lacked requisite skills for developing technology curricula. Although grantees requested additional support in curriculum development early on, the PCT did not have strong skills in this area. A key

lesson was the importance of providing sites with generic technology curricula and learning objectives that can be adapted for local use. While there were many technology training resources on the market, grantees felt that many lacked the appropriate levels of language, literacy, and cultural relevance needed in low-income communities. Making generic resources available would show program instructors where to begin so they can avoid reinventing the wheel with respect to technology curriculum. Selecting technical assistance providers with skills in this area could greatly enhance and expedite the curriculum development process.

Health Insurance Policy Program

Program Description

The goal of the Health Insurance Policy Program (HIPP) was to support the development of state policy to increase access to health insurance for employees and their dependents that was affordable, comprehensive and promoted health and the prevention of disease. To this end, the HIPP issued an annual report on the state of health insurance in California based on surveys of: the non-elderly population, HMOs, licensed health insurance carriers, purchasing groups and employers. In addition, HIPP team members developed policy briefs and related health insurance publications for broad dissemination to appropriate policy stakeholders.

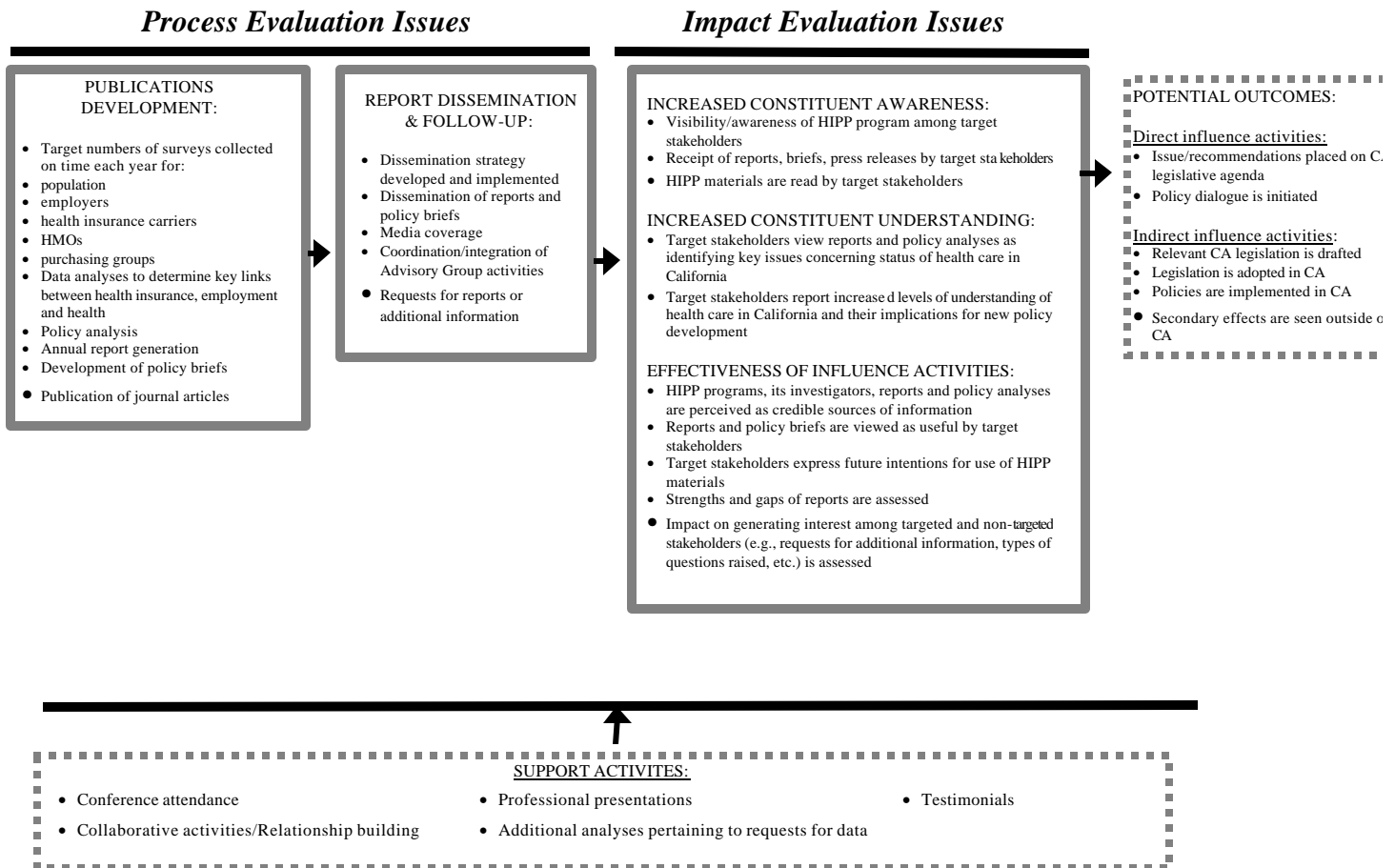
As part of the evaluation planning process, the evaluation team facilitated the development of a program theory for HIPP. As shown in Figure 4, the HIPP program sought to increase target constituents' awareness and understanding of the status of health insurance issues in California, and to influence policy development. The program theory shows that a range of publications development, report dissemination, and follow-up activities were conducted in an effort to reach those desired outcomes. Support activities and potential outcomes are shown in dotted line boxes to indicate that these were expected to occur but were not required by the funding agency.

HIPP Evaluation Questions

The HIPP program theory was used to generate and prioritize evaluation questions in four key areas, including:

1. Publications Development. Did HIPP conduct surveys of California individuals, HMOs, insurers, employers, and purchasing groups? Were data analyzed and policy analysis conducted on the basis of data gathered?
2. Report Dissemination and Follow-up. Were annual reports and policy briefs on the state of health insurance in California developed and disseminated to relevant policy makers?
3. Research and Policy Recommendations. Did HIPP identify key trends and make relevant policy recommendations regarding California health care needs, health status, risk status, and health risk behaviors? Did HIPP identify access barriers to affordable health care, health promotion and disease prevention? Were findings from different surveys integrated to impact policy development and target outcomes in meaningful ways?
4. Research Outcomes. In what ways was HIPP effective in raising awareness among policy makers and the public about the status of health insurance in California and influencing the direction of health-care policy?

Figure 4: Health Insurance Policy Program Theory



Data Collected to Answer HIPP Evaluation Questions

Interviews were conducted each year with a stratified, random sample of target audiences to address the evaluation questions. Key informants were stratified by organization type, including California policy makers, health insurers, HMO's, interest and advocacy groups, foundations, media, and university constituents. In-depth qualitative and quantitative data were gathered through face-to-face or telephone interviews to assess respondents' awareness of the research, understanding of material, how informative it was, and the influence of the research (i.e., credible, useful). CGU also examined whether and how respondents used the HIPP research in their work. In addition, media coverage and direct and indirect policy changes were tracked. Finally, a random sample of individuals publishing in the health insurance arena over the past five years were selected to provide a critical peer review of the HIPP research.

Overall, extensive qualitative and quantitative data were collected from over 300 key health care constituents over the program period, including three peer reviewers across the country not directly involved with the HIPP program. To supplement this, the CGU analyses also included a review of each research report and policy alert produced. Semiannual progress reports were also analyzed for key accomplishments and lessons learned.

Evaluation Data and Continuous Program Improvement Efforts

To support continuous program improvement within the HIPP research program, CGU prepared and disseminated 13 evaluation reports to HIPP program leaders over the four-year funding period. These included four year-end evaluation reports, four mid-year evaluation reports, and five interim reports. As tools for program monitoring and improvement, these reports documented not only key accomplishments and program activities, but also key program challenges and recommendations for addressing challenges. Conference calls and/or face-to-face meetings were held with program managers and TCWF program officers to discuss each report. During these various communications, CGU facilitated discussion on the meaning of the findings and on developing strategies and responses to address recommendations. In addition, CGU attended annual advisory group meetings and addressed questions pertaining to evaluation findings at those meetings.

Summary of Key Findings

- HIPP conducted annual surveys of California HMOs, health insurers, employers, and purchasing groups, and analyzed existing data sets of population-based surveys for four of the five years of TCWF funding. In the fifth year, 2000, the original program grant was terminated by the project's principal investigator. Although the surveys were conducted in the fifth year under a new contract, CGU was not asked to evaluate the work performed under the new contract. As a result, only four out of five proposed annual reports, and 12 out of 20 proposed policy alerts were produced by the original program grantees and evaluated by CGU.

- Approximately 7,000 reports were disseminated to targeted health care constituents over a four-year period. The number of annual reports and policy alerts produced and disseminated increased each year, from 579 annual reports released in Year 1 to 3,000

in Year 4. The primary method for dissemination was mailing the reports to key constituents in health care, government, legislature, media, interest and advocacy organizations, universities, and private organizations. Other dissemination vehicles included distributing copies at conferences and roundtables, sending copies to individuals who requested copies, and electronic dissemination.

- ❑ The HIPP team had a weak dissemination strategy at the early phase of their program, but significantly improved dissemination efforts over time with the aid of a media and communications consultant provided by TCWF staff. Early dissemination problems included lack of a clear dissemination strategy, lack of a clearly defined target audience, poor contact information for target constituents, and lack of coordination of dissemination efforts, particularly with regard to press releases.
- ❑ The HIPP received media coverage each year. Coordination challenges resulted in few stories covered in Northern California and none in Southern California in 1996. Coverage increased dramatically, however, with the release of the second publication. The HIPP team was successful at getting coverage in the State's largest paper, *The LA Times*, in the fourth year of dissemination, and coverage in the *San Francisco Chronicle* for three of the four years in which findings were released. With input and direction from their media consultant, the HIPP was able to gain coverage over key wire services in Years 2-4. This resulted in significantly greater coverage in both broadcast and print media.
- ❑ The HIPP identified several key barriers to affordable health care, health promotion and disease prevention. The core barriers included lack of access, cost, limited choice, and cost-coverage tradeoffs. Other factors included lack of standards, enforcement, and accountability among health care providers.
- ❑ Numerous policy recommendations were made in each annual report and subsequent policy alerts produced by HIPP. Collectively, over 100 policy recommendations were offered in several areas to address various ways to increase access to affordable, quality health insurance for the uninsured in California.
- ❑ Overall, responses regarding the reports' effectiveness, impact, credibility, and usefulness were very positive. Compared to other topics covered in reports, sections dealing with health insurance coverage and demographic breakdowns of the uninsured were perceived to be most informative, and were most likely to be viewed by respondents as the key messages being presented. In general, a higher percentage of respondents found the full report (in comparison to the policy alerts) to be "very useful" and "very effective" at capturing their interest and attention.

Considerations for Future Programming

Comprehensive Reports were more Effective than Policy Alerts. Compared to the policy alerts, the available evidence suggests that health care constituents are more likely to value and use comprehensive data in a single source such as the HIPP annual reports. Respondents were more likely to recall receiving these reports, and they were

more likely to recall information provided in these reports. They were also more likely to rate the policy recommendations in the report as useful and informative than those in the policy alerts. Of particular importance is that sufficient data are presented and analyzed in a manner to justify policy recommendations.

Media and Communications Technical Assistance was Crucial. The ability to conduct quality research does not guarantee that researchers have strong skills in advocacy and dissemination. University Public Relations offices often do not have sufficient dedicated time to be optimally effective when asked to support projects of this nature. The additional resources made available to hire a media and communications consultant added tremendous value in helping HIPP researchers clarify their target audiences, develop strategies for working with the media, develop talking points, and increase media exposure and coverage.

Productive Research Collaborations Across Universities are Difficult to Sustain. TCWF created the formal partnership between researchers working at different universities. While there seemed to be consensus among HIPP stakeholders, that the HIPP was able to accomplish more because of the combined efforts, it was very difficult to sustain this type of collaborative arrangement over time. Future efforts of this sort may benefit from well-designed processes to carefully select the partners, facilitate ongoing role clarification and communication, manage conflict, and to develop and reward teamwork.

Future of Work and Health

Program Description

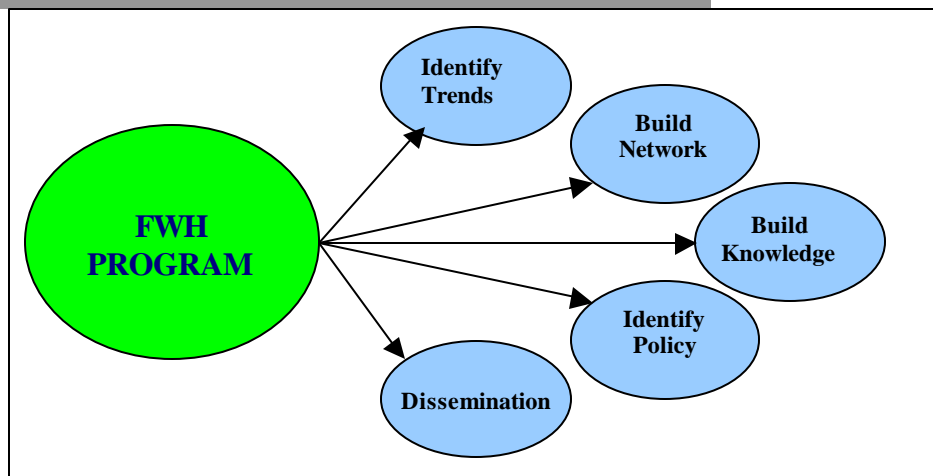
The second research program, the Future of Work and Health (FWH), aimed to understand the rapidly changing nature of work and its effects on the health of Californians. This program was designed to support a range of research projects and statewide convenings consistent with this aim. Key program objectives included: (1) identifying issues and trends important to the future of work and health of Californians; (2) building a network of people involved in building knowledge and improving practice to advance the future of work and health in California; (3) funding projects to illuminate trends important to the future of work and health of Californians; (4) identifying policies that can influence work and health trends to improve the health of Californians; and (5) disseminating research findings on California work and health trends from FWH program activities.

Modification of Original Program Goals. The FWH program goals changed substantially from program inception. The primary mission of the program changed from (1) improving health and well being of Californians through employment-related approaches targeting policy changes, organizational practices, and research, to (2) increasing our understanding of the changing nature of work and its impact on the health of Californians through research and convenings.

Program Theory. Developing a program theory for the revised program was quite challenging for a number of reasons. Identifying what could be evaluated required the program to be reconstituted again and projects put into place. It was agreed that work could not begin until after new projects were selected. However, once programs were funded, CGU learned that the new grantees were told that they were not expected to work with the CGU evaluation team. Instead, they were informed that TCWF would maintain

responsibility for evaluating program efforts directly. The conflicting role of having to evaluate the FWH program without having access to program grantees limited what could be accomplished on CGU's behalf. In addition, the CGU team experienced considerable difficulty gaining the cooperation of key representatives of the FWH program in the evaluation process. In order to clarify the new evaluation mandate for the revised FWH program, the evaluation team eventually gained agreement that the focus of the evaluation would center on the overall program as a unit of analysis, rather than on specific grantees or projects within the overall program. Figure 5 illustrates the program theory that CGU ultimately developed to guide the FWH program evaluation.

Figure 5: Future of Work and Health Program Theory



FWH Evaluation Questions

1. Trends. How effective was the FWH research and convenings program in identifying important trends about the future of work and health in California? What trends were identified?
2. Build a Network. How effective was the FWH program in creating a network of individuals working together on work and health issues? Who was involved in the network, what did they gain from their collaboration?
3. Build Knowledge. How effective was the FWH program in building knowledge about work and health connections in California? How well did program efforts help others understand the links between work and health?
4. Identify Policy. What policy suggestive findings were identified that can influence work and health trends and improve the health of Californians?
5. Dissemination. How were FWH research findings disseminated? How informative and useful were these to target constituents?

Data Collected to Answer FWH Evaluation Questions

The FWH evaluation focused on the effectiveness of overall program efforts in five core areas targeted in the program: identifying trends, building a network, building knowledge, identifying policy, and dissemination. More specifically, it was agreed that CGU would take an historical and descriptive approach to evaluating the effectiveness of FWH program efforts in reaching these goals. It was also agreed that CGU would conduct follow-up interviews with a random sample of individuals who participated in the culminating FWH Work and Health convening to assess the effectiveness and usefulness of the conference, as well as knowledge gained.

Toward these goals, CGU conducted an extensive document analysis review of more than 150 documents produced through the FWH program. The core documents included semi-annual grantee progress reports, research reports, and publications. Also included were reviews of annual press releases and press coverage, internal memos, and notes and summaries from program convenings. All documents were analyzed for key accomplishments and lessons learned. A database was created to assist tracking and analyzing program goals, activities, and key issues and trends identified in the documents. Finally, follow-up telephone interviews were conducted with a stratified random sample of 36 individuals who attended the final program convening in March 2001. Respondents were stratified according to whether they were internal (i.e., individuals who were funded as part of the California Wellness Foundation's Work and Health Initiative) or external (not part of Initiative) constituents. Prior to sampling, CGU excluded members from the three foundations who funded the conference as well as members from the evaluation team, to ensure the interviews focused on target constituents rather than conference sponsors.

Summary of Key Findings

- ❑ Key challenges faced in Year 1 stemmed from a lack of an underlying conceptual framework or program model that: (1) linked the objectives and strategies together; and (2) focused the content and activities of the program. Claremont Graduate University's (CGU) first year evaluation report recommended that the program could be strengthened by developing a framework grounded in a review of the work and health research, current corporate practices and public policies, and trends in the workforce.
- ❑ The first program grantee decided to terminate its grant upon completion of its first program year. Responsibility for the redesign of the program, as well as for program management, shifted internally to TCWF. Program goals were revisited and the program was reconfigured during 1997 and 1998 to address many of the challenges identified by CGU in Year 1.
- ❑ Three key trends were identified and focused on by the FWH program. These trends were (1) getting left behind by a changing economy, (2) a widening of income inequality, and (3) the changing contract between employer and employee. However, findings from many of the research projects funded by the FWH program did not seem to directly address the key trends.

- ❑ More than a dozen convenings were held throughout the program period that brought researchers, practitioners, policy makers, and other work and health experts throughout California together for sharing knowledge and building a network of individuals. Evidence suggests the majority of participants found these meetings useful for networking.
- ❑ The FWH program built a unique database based on the California Work and Health Survey (CWHHS) that links work and health issues in California. Based upon these data, the FWH program was successful in attaining broad media coverage, including 75 print publications, 34 stories in broadcast sources, and coverage on wire services for three out of four years. In addition, more than 50 manuscripts discussing work and health related findings were prepared for professional presentations or publication. However, CGU was not able to determine how informative and/or useful these efforts were to target constituents.
- ❑ The vast majority of the participants of the culminating conference who were interviewed reported that the sessions were “somewhat effective” or “very effective” in identifying linkages between work and health.
- ❑ The principal policy-relevant findings identified within the FWH program were developed and disseminated in six policy papers providing more than 40 different policy recommendations. Topics included: (1) the impact of the changing California economy on the future health of workers and their families, (2) strategies for bridging California’s digital divide and improving health, (3) opportunities to improve productivity and mental health of workers, (4) the changing retirement landscape in California, (5) the role of effective job search programs in preventing the threat of job loss on health and mental health of Californians, and (6) considerations for partially paid family leave in helping Californians balance work and family.

Considerations for Future Programming

Need Direct Links between Program Goals and Research Activities. Much effort was put into the FWH panel process to develop a program framework that included three trends that had important implications for the work and health of Californians. Unfortunately, there appeared to be a gap between many of the projects that were funded and how well they contributed to increasing our understanding of the core program themes. Future efforts would benefit from establishing explicit connections between the program framework and funded projects.

Need Mechanisms for Integrating and Synthesizing Findings. Developing a panel comprised of researchers and practitioners with expertise in work and health areas proved useful in identifying and prioritizing key trends and creating a program framework. What was missing was a continuation of the panel or another mechanism for identifying, integrating, and synthesizing findings from the funded projects. More efforts to identify the most important and sound evidence linking work and health in California could have proved fruitful.

The Employer Perspective was Missing. For the most part, the perspectives of the employers of California workers appear to be missing from the FWH program. Future efforts would likely benefit from identifying and clarifying the role of employers

in work and health. A key gap in knowledge exists with respect to the opportunities and constraints facing employers throughout California.

Link Policy and Dissemination with Research Efforts. A key goal of FWH was to identify policies that can influence work and health trends to improve the health of Californians. Aside from the CWHS findings, there did not appear to be any identification of policy-relevant findings from other research conducted within the FWH program. Groups such as CCHI were instrumental in working with Initiative stakeholders to begin identifying policy-relevant implications of research findings. The influence of the FWH program could have been strengthened by developing clear policy messages, identifying target audiences and policy opportunities, and creating clear dissemination strategies.

Require Key Grantees to Participate in Evaluation. When the FWH program was revised, it omitted the continuous improvement component of the evaluation that was present in the original grant structure (and other Initiative programs). Without clear expectations or role requirements to participate in evaluation, there were higher levels of resistance to serious evaluation efforts. As a result, most of the grantees were able to avoid meetings and conversations that might have led to the collection of useful evaluation data. If FWH grantees were required to participate in evaluation in the same way that the other WHI grantees did, it is our view that the FWH program would have had greater impact. In general, requiring formal participation in evaluation helps to reinforce collaboration and participation in evaluation efforts, which, in turn, enables grantees to benefit from continuous improvement efforts.

EVALUATION OF THE ENTIRE INITIATIVE

Evaluation of the Original Four Goals

The overall mission of the Work and Health Initiative was to improve the health of Californians by funding four programs designed to positively influence health through approaches related to employment. Findings related to the original four goals are presented below.

1. Understanding Links Between Work and Health. All WHI programs increased understanding of relationships between work and health. The two research programs (HIPP and FWH) were particularly focused on identifying links between work and health around issues of health care and health insurance, and employment status and conditions of work. The two demonstration programs (CIOF and WNJ) provided more indirect evidence of what works in helping to prepare individuals for employment and their implications for improving the health of Californians.

Based on the collective input and wisdom of many Initiative stakeholders, the central message that was created to help explain the link between work and health concerned having high quality employment. More specifically, “the best strategy for improving the health of Californians is a good job.” The evidence for this was based on the vast literature as well as data collected within the Initiative that demonstrates a variety of ways in which access to and conditions of work are related to health (cf. Brousseau & Yin, 2000).

A key achievement was the creation of unique statewide databases covering work and health and health insurance issues in California. A significant number of

publications, presentations, research efforts, convenings, and evaluations of each program made substantial progress toward deepening the understanding of the rapidly changing nature of work and its effects on the health of Californians.

2. Increase High Quality Employment. A significant number of participants in the two demonstration programs, WNJ and CIOF, reported finding high quality employment, or advanced educational opportunities that might lead to high quality employment in the future.

The two demonstration programs, CIOF and WNJ, were designed to address this goal directly by increasing opportunities for employment through technology skill building and job search assistance. The two research programs, HIPP and FWH, contributed to this goal by identifying important organizational practices (such as providing health insurance and good working conditions) that were related to improved health opportunities for Californians.

With respect to the demonstration programs, the evidence we collected demonstrated that individuals in both WNJ and CIOF found jobs. Nearly two thirds of program completers found jobs within six months of completing WNJ. As one indicator of employment quality, more than half of those who found jobs were reemployed in their chosen occupation. In contrast to WNJ, CIOF program grantees did not develop systematic employment follow-up data collection efforts. Most program leaders tracked employment success stories by asking participants who used their centers to tell them if and when they got jobs. As a result, several success stories were reported at each center over the four-year funding period.

Both the HIPP and FWH programs engaged in systematic, comprehensive, statewide data collection efforts that contributed to understanding important organizational practices that were related to improved health opportunities for Californians. The HIPP demonstrated that most Californians got their health insurance through their employer, and those without health insurance had poorer health than those who had health insurance. The HIPP suggested that a key strategy for improving access to health insurance and health care would consist of employers increasing their offer rates of insurance. Another key strategy entails efforts to increase affordability for both employers and employees. The FWH demonstrated that poor health is both a cause and consequence of employment problems, and identified several conditions of work that were related to poor health outcomes.

A key limitation to all these efforts was a lack of an agreed upon definition of and/or standards for identifying what constitutes high quality employment. The notion of continuous training and workforce preparation was a recurring and important theme identified by Work and Health Initiative stakeholders. This was also considered a key solution to ensuring high quality employment. Follow-up interviews with some of the CIOF program leaders raised the question of the appropriateness of targeting employment outcomes for youth and young adults ages 14-23. In contrast, there was strong agreement of the need for improving educational opportunities, basic skills, and literacy among this group to ensure that youth and young adults can compete in the workplace. Among WNJ program leaders, there appeared to be consensus in viewing employment success along a continuum from getting a job, a better job, and then a career.

3. Improve Conditions of Work. We have no evidence to support that conditions of work were improved for employed Californians. Furthermore, there

appeared to be no resources or programming specifically allocated toward achieving this goal.

Within the overall design of the Initiative, there were no resources or programming allocated toward improving the conditions of work in organizations. Although the FWH program was initially charged with improving organizational practices that lead to improved health of Californians, this goal was revised by the initial program director in 1996, then later dropped when the program was reconstituted between 1997 and 1998. Both the HIPP program, and especially the FWH program, generated findings in this area that could be used to identify organizational conditions that need improvement.

The design aspects of Initiative programs that had the most potential for impacting work conditions, albeit indirectly, were the dissemination and policy influence components. The volume of reports generated and disseminated, the number of convenings held and attended, and the amount of media coverage gained, illustrate the potential range of influence the Initiative had for indirect influence of work conditions. It is certainly possible, for example, that the broad dissemination efforts to the general public reached organizational leaders and informed, if not influenced, their thinking about these issues. It is also possible that individuals connected with the Initiative increased organizational leaders' thinking through policy and educational efforts. Unfortunately, without resources directed toward this objective, and a lack of interest among program stakeholders to examine the link between these issues, it is not possible to determine whether any of these efforts influenced organization practice.

In addition to a lack of programming in this area, a key limitation was the lack of involvement of corporate players throughout the state. The ability to affect organizational practices and the conditions of work will likely be enhanced by input from and cooperation with organizational leaders.

4. Expand the Availability of Worksite Health Programs and Benefits. There was no evidence to demonstrate that the WHI expanded the availability of worksite health programs and benefits, nor were there resources or programs dedicated to this goal. However, the HIPP tracked the availability of worksite health promotion programs and made policy recommendations to suggest how this might be accomplished. The fourth broad goal of the Initiative was to expand the availability of worksite health programs and benefits. There were no projects funded to expand the availability of health programs. The HIPP, however, was charged with supporting the development of state policy to increase access to health insurance coverage that emphasized the integration of health promotion and disease prevention. Each year the HIPP collected data from both employers and health insurers on this topic and developed policy recommendations to affect this goal. A key finding was that most employers surveyed do not offer worksite health promotion programs in California. Although many health insurers offered these programs, low rates of utilization prevent these programs from maximizing health improvement among employees.

Evaluation of Areas of Special Interest to TCWF

A summary of key lessons learned about topics of special interest to TCWF is provided in this section (also see Donaldson, 2003; Donaldson & Gooler, 2002a, 2002b, in press; Fitzpatrick, in press; Gooler & Donaldson, 2002). Lessons learned were

extracted from numerous sources of data collected over the life of the Initiative, including grantee progress reports, site visit observations, quantitative and qualitative data collected by CGU, and through conversations with TCWF program officers and program grantees. In addition, CGU conducted 30 to 60 minute follow-up interviews with most grantees after their programs were completed to specifically discuss lessons learned. From these efforts, we present cross-cutting lessons learned in regard to: (1) grantee capacity building, (2) effectiveness of program coordination teams, (3) effectiveness of program evaluation efforts, (4) program sustainability within funded projects, and (5) effectiveness of Initiative program management.

1. Capacity Building

The main ways in which capacity was built among grantees included: (1) expanded outreach and increased services offered, (2) increased visibility and exposure for funded organizations, (3) strengthened organizational knowledge and skills, (4) increased expertise in serving target population, and (5) strengthened connectivity with others. Factors most likely to impact capacity building included (6) effective working relationships with TA providers, (7) usefulness of program evaluations, and (8) personnel turnover.

Capacity building meant different things to different grantees. In general, capacity building was perceived to include the multitude of ways that organizations were improved or changed that enabled them to do things they otherwise would not be able to do. For some, capacity building was strengthened from acquisition of additional resources; for many, capacity building resulted from gaining new knowledge, skills, and experience. Several cross-cutting lessons learned with respect to capacity building are presented below. Due to the different foci of each program, and the unique challenges and successes addressed within each program, some lessons do not apply equally to all Initiative grantees. The goal here is to illuminate key ways that capacities were strengthened throughout the Initiative.

Resources expanded outreach, increased services offered. Most grantees understood that funding was based on the expertise and experience they possessed. In light of this, the most frequently mentioned way they felt their capacity was built was through enabling them to expand their services to reach new populations. Among program managers, this was frequently expressed as “getting a chance to apply what we do in these types of organizations.” The result was to strengthen their understanding and effectiveness in working with these types of (community-based) organizations. As noted by one TA provider, “we gained a greater depth of experience in working with service organizations. We developed a much deeper understanding about the effect of the program on organizations that adopt them.” Comments by program grantees were centered more directly on their increased ability to serve their target population through expanded and improved programming efforts.

Increased visibility and exposure for funded organizations. Many grantees stated that their involvement in the Initiative led to increased visibility for their organization. As a result, their positions as leaders in their field were perceived to be strengthened. The components that seemed to contribute most directly to increased visibility included attention generated from dissemination and policy influence efforts. In addition, exposure to others through convenings, discussions, and publications of

program findings also served to increase their visibility. Some grantees noted that funding by TCWF showed other funders that their organizations were worthwhile investments, which was also a confidence booster for the grantees.

Strengthened organization knowledge and skills. Building new knowledge, skills, and expertise was a core way in which many grantees developed capacity. Related to this, many differentiated between building personal versus organizational skills. On the one hand, their personal knowledge and skills were often strengthened, enabling them to do new things or improve their programs. However, institutionalization of these skills was not automatic. Key challenges for institutionalizing knowledge and skills included personnel turnover, lack of documentation of lessons learned, lack of staff development efforts, and a lack of visibility and support from senior management.

Increased experience and expertise in serving target populations. Funding from TCWF gave many grantees the opportunity to work with new or hard to reach populations, enabling them to put to the test many of their beliefs and assumptions and learn more about how best to serve their target population.

Connectivity with others was strengthened. The very design of the Initiative placed a high value on collaborative relationships. This was viewed as central to the design, implementation, management, and sustainment of programs. Through numerous convenings, meetings, conference calls, and electronic exchanges, Initiative grantees increased their sense of connectivity with others who were faced with similar challenges and opportunities. Additional grants were helpful in providing support for website development for Initiative programs and providing assistance with creating electronic discussion lists. Overall, an increased use of technology played a key role in enabling grantees to communicate with one another, share information, and seek help from each other. As a result, a strong network emerged among Initiative grantees.

Effective working relationships were essential to building capacity. Most grantees noted that their TA providers were terrific to work with and made real contributions to their organizational planning and improvement efforts. Not all TA providers, however, were perceived as having or offering needed skills and expertise. Some grantees wanted the ability to select their own TA providers from their local communities. Factors noted as important in facilitating useful relationships between TA providers and grantees included being within close proximity of one another and sharing similar backgrounds and/or personalities. Establishing trust and rapport were seen as the most important factors for building effective working relationships.

Evaluation was instrumental in building capacity. Initially, program stakeholders did not necessarily see the connection between program evaluation and the use of findings for facilitating program improvements. Many resisted the evaluation and some found the evaluation process to be burdensome. To be effective, stakeholders must understand how the evaluation fits in with their overall program goals and how they will benefit from incorporating evaluation practice in their organizations. Many grantees said they gained a new understanding of evaluation. Some reported that this was the first time that they had understood the value of evaluation, and others said this was the first time they had useful data. They also reported gaining new skills in gathering, implementing and utilizing data for program monitoring and improvement efforts. Evaluation capacity building was especially useful in program dissemination efforts that included general marketing efforts, grant proposals, and policy influence.

Staff turnover impacted capacity building. Each of the Initiative programs experienced some level of turnover of key personnel. Turnover resulted in the loss of programmatic knowledge and skills that were developed in staff, and often resulted in interrupted service to target constituents. In some cases, turnover resulted in the loss of program resources, such as curricula and data collection resources. Newcomers were not often informed about the history or nature of the program they entered, and did not share the same vision or understanding of the program. In some cases, turnover resulted in lack of understanding and commitment to key program goals among new hires. Therefore, it is important to expect and plan for turnover in these types of organizations, and identify strategies for minimizing the impact of turnover on capacity building efforts.

2. Effectiveness of Program Coordination Teams

Within the WHI, program coordination teams served dual roles of providing guidance and technical assistance. Program coordination teams were generally viewed as very effective by program grantees. Aspects of their role that grantees viewed as most important included: (1) providing direction and focus in programming efforts, (2) providing advocacy and support to grantees, and (3) organizing and facilitating convenings. Direct technical assistance provision and role conflicts were viewed less favorably.

Providing direction and focus was important. A key function fulfilled by program coordination teams was to keep grantees focused on their program goals. Program coordination teams also helped to facilitate grantees' sense of being connected to something bigger than individual programs/organizations. Because program coordination teams were usually the main contact grantees had with the overall Initiative, there was often confusion about their roles vis a vis TCWF program officers during the early phase of each program. This was exacerbated when program managers and TCWF program officers occasionally sent conflicting messages to them.

Advocacy played an important role. Most grantees felt their program coordination teams played an important advocacy role on their behalf. This ranged from efforts to secure additional funding to providing support for developing dissemination materials and influencing policy makers and other community leaders on their behalf. As a result, most grantees commented that they felt very supported by members of their program management teams. As noted by one grantee, "they really cared about us and took the time to give us the support we needed." Similarly, another grantee recalled that, "they didn't have to be that way—they could have been very procedural and task-oriented. Instead, they really seemed to care about us." Advocacy, however, sometimes got in the way of providing strong guidance and leadership. It is CGU's view that some TA providers advocated too vigorously and were overly concerned with maintaining supportive and friendly relationships—at the expense of acknowledging problems and working with grantees to address program weaknesses and challenges.

Organizing and facilitating convenings added value. Program coordinators were found especially effective at organizing and facilitating meetings, conference calls, and convenings among the grantees. Many grantees said they did not have the time, skills, or desire to take on this responsibility. They were very happy to have a third party fulfill this role and help facilitate decision making and collaboration across sites. Related to this, program coordination teams were found to be instrumental in pushing grantees to

discuss and address important issues and program challenges. In addition, they encouraged and reinforced the importance of cross-site collaboration. Several grantees noted that they would not have felt they had something to offer other grantees if they had not been encouraged to share their practices and lessons learned. Others said they would not have been as receptive to learning from others had it not been reinforced by their program managers.

Unmet expectations reduced perceived effectiveness. Unmet expectations posed an important barrier to grantees' willingness to work with program coordination teams. This was especially a problem during the start-up phase of each grant. Particularly within the CIOF program, many grantees held expectations about what they thought their program coordination team would do for them. When these expectations were not met, the result was sometimes frustration, disappointment, and withdrawal. Several grantees perceived that they did not receive equitable levels of TA support compared to their peers. A key factor that impacted these relationships was geographical distance between the program manager and the implementation site. Other factors included a lack of role clarity and a lack of expertise that was needed by grantees. For example, in terms of role expectations, many sites expected that one TA provider provide them with more hands-on technical assistance, and were disappointed that this did not happen. With respect to types of technical assistance needed, many CIOF grantees noted they wanted more expertise from their program coordinators in fund raising, curriculum development, employment development, and staff development.

3. Effectiveness of Program Evaluation

The evaluation team identified several factors that contributed toward effective program evaluation. Perhaps most importantly, feedback from grantees suggested that the evaluation was useful and valued. Other aspects of the evaluation that were effective included: reducing time and costs through a tailored evaluation approach; facilitating program design improvement; facilitating program implementation improvement; providing continuous program improvement; and providing positive feedback. Core challenges to effectiveness centered on managing evaluation anxiety, gaining buy-in from grantees, and providing useful and timely information and reporting systems.

Evaluation was found useful by grantees. Many grantees reported that the evaluation served to provide helpful feedback on how well their programs were operating. Evaluation reports were found to be especially useful in helping sites identify areas for program improvement and for providing data that were used in program dissemination efforts. Findings were used regularly by demonstration programs to inform policy makers, influence funding opportunities, and market program achievements to target audiences.

Potential for substantial time and resource savings. The process of developing program theory sometimes revealed that aspects of the programs were not ready for implementation and evaluation. In this case, a substantial amount of time and resources were saved by redirecting efforts toward further program development. Secondly, program theory helped prioritize evaluation questions, which helped grantees and TCWF decide how to allocate evaluation resources in a cost-effective manner. We found that developing program theory usually enabled program management teams to make

informed decisions about evaluation design and methods, often leading to cost effective evaluation.

Evaluation facilitated program implementation improvement. Once program theory was developed, sometimes it becomes apparent that a program was not being implemented well enough to affect key mediators or outputs conceptualized in the program theory. For example, there were not adequate resources or activities in place to affect targeted mediators. Again, before employing costly empirical summative evaluation methods, grantees were given the opportunity to improve the implementation of their program.

Formative evaluation can lead to goal change instead of program improvement. A common expectation of formative evaluation is that empirical evidence or findings will be used to improve the delivery of the program. However, we also found that these data were used to adjust program goals. Once stakeholders see evaluation data, they sometimes decide that negative findings suggest initial expectations are unrealistic. Rather than continue to fail to meet unrealistic goals, they seek approval to make goals and objectives more reachable given time and resource constraints. As evaluators, we view this as a healthy process under some conditions (e.g., when goals are not obtainable), but it can also be used as an excuse for poor performance.

Strategies for managing evaluation anxiety are often required. The fear of a negative evaluation during a participatory evaluation process over an extended period of time tended to make some stakeholders very anxious at times (particularly those not confident about their performance). Excessive evaluation anxiety can result in problems related to gaining access to critical information, lack of cooperation, compromises in the quality of data collected, undermining the validity of findings, lack of data utilization and program improvement, and a general dissatisfaction with program evaluation and evaluators. It is important to expect and accept evaluation anxiety as a natural component of the interaction with stakeholders. Effective strategies for managing excessive evaluation anxiety include: (1) legitimize opposition to bad evaluation, (2) determine what stakeholders hope the program will do for them personally, (3) discuss the purposes of evaluation in detail to avoid fake evaluations, (4) discuss professional standards for program evaluation, (5) discuss why honesty with the evaluator is not disloyalty to the group, (6) provide role clarification on an ongoing basis, (7) build relationships with program stakeholders, and (8) create opportunities to role model productive ways to respond to and use evaluation findings (see Donaldson, Gooler, & Scriven, 2002).

Goals for providing continuous improvement feedback. A central goal of the Work and Health Initiative was to facilitate continuous program learning, problem solving, and program improvement throughout the life of the Initiative. When evaluation is used to improve organizational performance, there are several requirements for it to be effective. Formative evaluation feedback should strive to (1) improve the design of projects and demonstrations, (2) identify the indicators and performance targets needed to improve effectiveness and responsiveness to challenges, (3) inform how programs are being implemented for diverse populations across multiple locations, (4) identify and describe key accomplishments, challenges, and lessons learned, and (5) offer recommendations for program improvement (Gooler & Donaldson, 2002).

Information and reporting systems were key challenges. Core challenges in the evaluation of the Initiative were how to produce timely evaluation reports and develop information systems that were useful for multiple stakeholders. Key issues included meeting the diverse information needs of multiple stakeholders, focusing reports on high level issues and challenges, synthesizing tremendous amounts of data from multiple sources, providing diplomatic feedback, and keeping reports to a readable length. A key lesson was that even the best reports might lose their impact without conversations and dialogue with stakeholders about the meaning of the data and their implications for program improvement. This is a time consuming, but important companion activity that increases the utility of reports.

4. Sustainability

Several months out from their funding period, we see evidence for many sustained practices among several Work and Health grantees, but little sustained programming among others. Key challenges to program sustainability include: unclear goals and expectations, a lack of early and sustained resource procurement efforts, an insufficient evidence base, a lack of top management support, and limited availability of core operating support from funders.

Sustainability may occur along a continuum ranging from continued offering of programs as designed, continued offering of certain program components, to sustainment of new behaviors and skills developed through funded efforts in other organizational practices. Several months out from their funding period, we see evidence for many sustained practices among several Work and Health grantees, but little sustained programming among others. The program that appears to have the most sustainment is CIOF. Most centers continue to offer some level of open access and training, though the hours of access and focus of training may have shifted to match new funding opportunities and constraints. Through additional funding from TCWF, CIOF grantees continue to function as a statewide network, with a focus on policy influence activities, joint fundraising efforts, and continued support of each other. Nine of the original CIOF grantees received funding through the WIA legislation to provide ongoing multimedia training to their communities. In contrast, among the three WNJ sites, only one continues to offer the WNJ program as part of its Rapid Employment Program. Finally, researchers from both FWH and HIPP programs have indicated that they continue to conduct research in the same areas that they were funded by TCWF, and that they are seeking new funding opportunities to carry on some of the same types of research.

There are numerous challenges to program sustainability. Highlighted below are several key lessons learned with respect to sustainability within the Work and Health Initiative.

- Unclear goals and expectations about sustainability can delay or prevent sustainability
- Resource procurement needs to start early and build over the life of the project
- Sustainment requires strong top management support
- Institutionalization may be an unrealistic goal for some programs
- Demonstrating success and value added is critical for convincing external funders
- Developing relationships with corporate sponsors is time consuming and requires a liaison with a high level of business acumen
- Many funders look to fund only new programs

5. Effectiveness of Initiative Program Management

Finally, one of the unique components of the evaluation was the 360 degree evaluation feedback process that was implemented to give grantees an opportunity to give feedback on the effectiveness of Initiative program management. Evaluation of TCWF program officers by grantees during the first three years of the Initiative revealed several factors that contributed toward successful management of the overall initiative. These included TCWF sensitivity and responsiveness to the concerns and needs of grantees, and demonstrated interest and involvement of program officers in grant programs. In addition, grantees viewed TCWF program officers to be very accessible, approachable, and hands-on. Program officers were also commended for being solution-focused, rather than problem-focused. Grantees also suggested several areas for improvement, including: (1) providing better clarification of roles and responsibilities, (2) providing more education on how foundations operate, (3) providing clear communications about changes in foundation policies or program expectations, and (4) hiring a professional facilitator for convenings of grantees.

Considerations for Future Initiatives and Grantmaking

This section is intended to briefly highlight key information or lessons learned that might help improve the design of new Initiatives in this area. Considerations for program design and planning, program improvement, program management, and program institutionalization and sustainability are offered below.

The Initiative Enhanced Visibility and Resources for Programs. Several of the program leaders reported benefits from being part of a larger initiative. For example, a wide variety of WHI convenings enabled them to share experiences, expertise, and resources with each other, to expand their professional networks, and to enhance the visibility of their programs in new domains. Several regret that they did not create and capitalize on more opportunities to create synergies across the four programs.

It was Difficult to Motivate Program Grantees to Work on Initiative Goals. While there appeared to be great interest in working together to develop and achieve WHI goals beyond program level goals, it was difficult to motivate program grantees to follow through. We believe this was largely due to their focus on the demands of the individual programs, and because they were not funded and lacked incentives to work on the broader WHI goals. Furthermore, this was clearly de-emphasized by TCWF after the first two years of the Initiative's start.

Staff Turnover was Frequent and Reduced Productivity. Within each program there was staff turnover. Turnover in demonstration programs was especially frequent and occurred at all levels, from executive directors, program directors, to staff and volunteers. A major negative consequence of turnover in WHI was that new staff typically required extensive training about the various aspects of WHI, as well as their specific job responsibilities, to be optimally effective. It was very difficult to meet this continuous training need. Therefore, it is important to expect and plan for turnover in future initiatives in this area, and to identify strategies for smoothing over staffing transitions.

TA was Key to Addressing Unfamiliar Territory. Technical assistance (TA) was instrumental in helping grantees develop and implement programming in areas

where they had little prior experience. Key areas in which additional TA or resources for TA were needed included: creating dissemination and communication strategies, developing curricula, creating policy agendas and policy influence strategies, employment development, and resource procurement. Unfortunately, existing TA providers did not always have requisite skills in these areas (e.g., curriculum development) or were located at great distances from some grantees. As a result, there was a strong preference among grantees to use a discretionary pool of resources for meeting local TA needs. However, many grantees noted they needed assistance in locating and evaluating these resource providers.

Relationship Building was Critical to Program Success in Core Areas. Complex problems often require complex solutions that are best addressed through a partnership of resource providers. Establishing and maintaining collaborative relationships, however, can be challenging even under the best circumstances. Ongoing relationship building was critical for establishing buy-in and securing ownership with other partners. Establishing a shared understanding of and agreement around roles and responsibilities with organizational partners was an important lesson learned in the Initiative.

Quality was More Important than Quantity of Direct Service. There exists an inherent tension between the quantity and quality of service delivered. Several grantees felt there was undue pressure to reach service goals at the expense of developing and offering high quality services to program participants. Related to this, it is important to determine how to improve direct service, and to make sure that resources are not being wasted on ineffective or potentially harmful services.

Dynamic Programs Required Dynamic Program Evaluation. Like organizations, programs develop through a progression of life stages. Complex programs go through many changes from program design to institutionalization, and evaluation efforts should be adapted to address changing information needs over time. To be responsive to these changes, dynamic evaluation requires that evaluators work closely with program stakeholders over time, are flexible in their approach to addressing changing needs and changing goals, and are able to shift evaluation resources to match new priorities. Clear communication about the role of evaluation at each phase of the evaluation is critical to fostering ongoing trust and rapport (Donaldson, 2001).

Institutionalization and Sustainability Goals were Not Achieved. There was strong interest in sustaining programs beyond TCWF funding. Key challenges consisted of unclear institutionalization goals, a lack of guiding mechanisms for deciding which elements were worthy of institutionalization, a lack of resources for planning and strengthening sustainability efforts, and a lack of expertise in procuring resources and responding to RFPs. Institutionalization and sustainability were least effective when efforts to achieve these goals were started toward the middle to the end of program periods, rather than at the beginning. Continued, sustained efforts to building top management buy-in and finding resources seem essential for ensuring programs continue beyond initial program periods.

Timing was Very Important. The state of the economy in California and the challenges and opportunities facing each program area looked very different five years ago. Historical trends and variable changes over time affected both the visibility and success of Initiative programs. When CIOF was constituted, for example, the digital

divide was not present in everyday vernacular. Whereas very few community technology centers existed in the mid 1990s, there was an explosion of these types of organizations during the last five years. CIOF policy influence efforts were being developed during a critical window of opportunity that simply did not exist in other programs. With respect to WNJ, the economy improved dramatically during the past five years making it difficult for grantees to meet their target service goals (there were not as many unemployed!). Future programming should consider how macro changes in the environment and economy will influence the success of programming efforts.

CONCLUSION

The main purpose of this summary was to provide a brief account of the summative evaluation presented to TCWF by CGU (Gooler & Donaldson, 2001). Selected evaluation findings and conclusions for the TCWF's WHI were presented. These evaluation findings and conclusions were based on analyses of extensive quantitative and qualitative databases designed and managed by CGU from 1995 to 2001. Many of the findings and issues presented are described in much more detail in one or more of the 200 evaluation reports that have been written by CGU and provided to WHI grantees and/or TCWF throughout the life the WHI. This summary reflects CGU's candid summative evaluation of the WHI from an external evaluation perspective. Despite the shortcomings and challenges noted throughout this summary, collectively the findings of this evaluation suggest that The California Wellness Foundation's Work and Health Initiative has already improved the lives of many California workers and their families. Evaluation evidence suggests this impact will multiply and expand over time, and that this Initiative will ultimately be viewed as a successful, ground-breaking effort in the changing domain of Work and Health.

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