

A Parent Engagement Guide to Improve Program Outreach

ideas **42**



Coaching families to achieve goals with LIFT-NY

LIFT-NY provides personalized career and financial coaching to parents of young children to ensure a brighter future for the whole family. While many parents express interest in participating in LIFT-NY's program by scheduling an intake meeting, many don't show up. To support LIFT-NY's efforts to recruit and engage parents who can benefit from their coaching program, we designed a behaviorally informed Parent Engagement Guide to help staff talk to potential members about the program. We also provided recommendations for how to use the guide when training staff and referral partners, and additional recommendations to engage and motivate potential members to attend their intake meetings.

Summary

Providing career, financial, and education supports can go a long way toward strengthening futures for families. LIFT is a national program operating in Chicago; Washington, DC; Los Angeles and New York that does just that. The non-profit organization offers free one-on-one coaching sessions to parents of young children to help them pursue a variety of goals over a two-year period. In 2018, LIFT helped its members **secure more than \$8.1 million in wages, public benefits, and tax refunds**. Since 1999, LIFT New York has served more than 8,000 individuals and families, helping them save money, pay down debt, start small businesses, and get accepted into professional education programs.

In order to be eligible for LIFT's program, potential members must (1) be a parent or caregiver of a child under the age of eight (or be expecting a child), (2) have stable housing, (3) be employed or in an education program and (4) be interested in and available to attend coaching sessions.

The first step to working with the organization is to schedule and attend an intake meeting. Interested parents can schedule their intake meeting through a partner organization, including government and non-profit agencies, or directly with LIFT-NY. While the New York program schedules many meetings with prospective members, some of them were “no-shows”—meaning the parent didn't come to the meeting or reschedule.

It's clear that LIFT-NY offers tangible value to its members—and it has the capacity to provide valuable services to even more people. By understanding and addressing the gap between signing up for a meeting and following through to attend it, LIFT-NY can help more people get started pursuing their goals.

Highlights

- ▶ Career and financial coaching can help strengthen futures for families.
- ▶ LIFT provides free one-on-one coaching to parents of young children, but uptake is lower than expected.
- ▶ Behaviorally informed outreach can help staff underscore the benefits of the program and encourage parents to come to an intake session.

The No Show Problem

In some cases, parents do not attend their intake meetings because they are not interested in the program, or they are not in a place in their lives where they can benefit from it. Others are interested and able to participate in the program, but they may miss their intake meetings for many reasons. LIFT-NY wanted to reduce the number of parents scheduling meetings who were not actually interested in the program, and support those who are interested but do not attend.

Since identifying this problem, LIFT-NY has used a number of behavioral strategies to reduce the number of no-shows, including text message reminders and appointment cards, but did not see sufficient improvement in attendance at intake meetings. Believing that more progress is possible, LIFT-NY partnered with ideas42's Behavioral Design Center (BDC) to further explore and address the problem using behavioral insights.

Why not attend an intake meeting?

To understand what affects whether parents attend their intake meetings, we surveyed parents who never attended their meetings (the no-shows) and parents who had just completed their meeting. We also interviewed current members and staff who conduct recruitment, and we observed a recruitment event.

Through this work, we uncovered four main reasons parents do not attend their scheduled intake meetings:

- 1.** Some parents do not form an intention to attend even when they schedule the meeting. In some cases, they simply agreed to schedule the meeting because they felt it was more polite to do so than turn down the offer.
- 2.** Parents have busy lives so scheduling conflicts are rampant and the intake meeting isn't always top of mind. Some parents decide against participating at all because they are unlikely to be available for the intake meeting or subsequent coaching sessions, while others face scheduling conflicts or emergencies on the appointed day that lead them to miss the meeting. Parents' busy lives can also lead them to forget about the meeting (though LIFT-NY's existing reminder system aims to address this problem).
- 3.** Many parents are not familiar with LIFT-NY and do not feel they have enough information about the program to participate in it. This lack of information may lead them to distrust the program, make assumptions about the requirements (often rooted in negative past experiences with other programs), and/or fear that participating may affect their public benefits. Any of these concerns, or others resulting from incomplete information, can discourage eligible parents from attending the intake meeting or seeking additional information.
- 4.** Other parents may feel comfortable coming to the intake meeting without being familiar with the program, but still decide against doing so because the benefits of participating are not clear to them. As a result, taking the time to come to the intake meeting does not feel worthwhile.

Interviews with program staff revealed a number of best practices to encourage meeting attendance that became second-nature to staff members over time, but were not necessarily an explicit part of the guidance LIFT-NY provided to new team members or partner organization staff. Often, the practices that experienced staff shared with us address one or more of the barriers we uncovered.

- ▶ For example, experienced LIFT-NY staff have developed an intuitive sense of which parents are likely to be a good fit for the program, which reduces the likelihood of scheduling an intake meeting with someone who is not interested or able to participate in the program. This sense includes practical considerations, such as whether the parent would be able to physically come to the LIFT office once a month during the workday, as well as a qualitative assessment of being “coaching-ready.” One example of a coaching-ready parent is someone who can identify a goal for themselves and their family, and may have even attempted to achieve that goal on their own but wants more support in their efforts.
- ▶ Similarly, team members with lots of recruitment experience discussed the importance of being upfront about privacy, what documentation LIFT-NY requires of its members (none) and whether participating in the program would affect other services or benefits the member receives (it shouldn’t). Parents mentioned these concerns in our interviews and surveys when discussing their distrust of the program, affirming the importance of this practice.
- ▶ Finally, experienced staff members often shared compelling stories about members’ successes through the program. Such examples can help clarify the benefits of LIFT’s program, but newer team members and staff at partner organizations did not have easy access to these stories.

Recruitment and outreach recommendations

Based on these findings, the BDC developed a Parent Engagement Guide and other recommendations to support LIFT-NY’s recruitment efforts and referrals from partner organizations. The main goal of our guide and recommendations was to help staff of LIFT-NY and its partner agencies identify parents most likely to be interested in the program, and help them explain the program in a way that encourages parents to attend their intake meeting. The guide:

- ▶ **Highlights important eligibility benchmarks and reframes them** so they are easy to communicate, assess, and act on. For example, rather than listing the eligibility criteria (e.g. “must have stable housing”), the guide frames the criteria as a set of specific yes/no questions (e.g. “Do you know where you will be living for the next six months?”), which staff can pose to members and use to determine eligibility.
- ▶ **Offers concise program information and talking points** that anyone can use to explain the program, mitigate parent concerns, and concretize benefits, thereby increasing the likelihood that parents will attend their intake meeting. For instance, it includes a list of examples of what LIFT has helped its members achieve, such as reducing \$20,000 in debt to \$6,000 in two years.

While the guide itself will be a useful resource to support LIFT-NY and its partners' efforts to recruit new members, its success depends on effective staff and partner training about the process, information and skills needed to discuss the program with potential members. Consequently, we offered recommendations and examples of how to train LIFT-NY and partner staff on the points summarized in the guide, including recommendations to help staff develop a clear mental model of typical members, explain the benefits of LIFT services and the concept of coaching, and answer common questions about the program.

Finally, we shared a few other recommendations for helping people attend their meetings, including:

- ▶ Lower barriers to attending intake meetings by establishing select weekend and/or evening time slots, and offering to conduct the meeting by phone if necessary.
- ▶ Further enhance the effectiveness of text message reminders through automation, asking potential members when they are most likely to look at their phone so they can be texted at an opportune moment, and sending messages from a consistent phone number so parents can recognize the text message as coming from LIFT-NY.
- ▶ Encourage and facilitate peer referrals by providing current and former members with informational resources that help them explain the program and eligibility criteria, and provide key information like staff contact details.

What's next?

LIFT-NY is already using the Parent Engagement Guide to train their staff and partner organizations and is making plans to implement our other recommendations. LIFT-NY has also shared the guide and recommendations with the national LIFT organization, which is considering how to incorporate them into LIFT programs around the country. Scaling these behavioral insights beyond the New York program could help even more people access and use LIFT's effective services.

Other direct service programs could also adapt the insights generated from this work. By incorporating behaviorally informed strategies to help potential clients follow through on their intentions to enroll in and attend supportive programs, organizations like LIFT can help more families make their goals a reality.

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