



<b>WS 12-17</b>
<b>September 26, 2012</b>
<b>Financial Aid</b>
Expires: <b>Continuing</b>

To: Career Offices  
Financial Aid Payment Office

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SUBJECT: WIA Gold Standard Evaluation – Updated Procedures and Guidance

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## Purpose

Provide updated instructions and guidance for tracking customers who are participating in the national WIA Gold Standard Evaluation.

*This issuance replaces issuance 11-33: Implementing the WIA Gold Standard Evaluation.  
Significant changes are highlighted*

## Background

The U.S. Department of Labor (DOL) contracted with Mathematica Policy Research Associates to evaluate the effects of the Workforce Investment Act. Partners in the evaluation effort include Social Policy Research Associates and MDRC. The Gulf Coast Workforce Board is one of 30 across the nation selected for the study, which began December 7, 2011.

TWIST is programmed to limit service tracking to specific allowable services. TWIST was updated on August 23, 2012 to allow tracking with service code 203-Transportation and 207-Other Support Services for customers randomly assigned to the limited service groups: “Core” and “Core and Intensive” – and to allow tracking of financial aid of \$200 or less in the Support Service tab.

We revised and updated our procedures and guidance for tagging customers assigned to these limited service groups.

## Procedures

Customers from all career offices and call centers who request financial aid over \$200 must participate in the study unless they are tagged in NEG-OJT, NEG Multi-Company Layoff, TANF Choices or SNAP E&T. Workforce Solutions staff:

1. Complete the Study Eligibility Checklist.
2. Provide the customer with an orientation about the study, and obtain the signed informed Consent Form.
3. Complete the Study Registration Form and the Contact Information Form.
4. Enter information into the Random Assignment System (RAS) to assign the customer to a study group.
5. Notify the customer of his or her group assignment.
6. Enter study group assignment information into TWIST.
7. Keep study forms secure and send them to Mathematica as scheduled.
8. Maintain integrity of the group assignments.

**How are customers assigned to a study group?** When a customer requests financial aid over \$200, staff will enter the customer's information in Mathematica's Random Assignment System and the system will *randomly assign* the customer to one of three study groups:

- About 3% of customers requesting financial aid over \$200 are assigned to a group limited to receiving only basic service and financial aid of \$200 or less.
- Another 3% of customers are assigned to a group limited to basic and expanded service and financial aid over \$200 for supportive services only.
- The majority of customers are assigned to the group receiving a full range of service, including financial aid for training over \$200.

**How long is the study?** The study *enrollment* period is expected to end in January 2013. Customers must stay in their assigned study groups for 15 months after they are randomly assigned. It is important that customers only receive the kind of service allowed for in their assigned groups for these 15 months. Otherwise, the study may erroneously show that the service has no effect.

**How will results of the study be evaluated?** The evaluation team will collect detailed data on customers in the study. Customers will be asked to participate in two telephone surveys—one 15 months and the other 30 months after they are assigned to a study group. The impact of the service will be estimated by comparing customer outcomes in each of the groups.

**Are all customers who receive TANF or SNAP excluded from the study?**

No. Only customers tagged in TANF Choices or SNAP E&T are excluded from the study. Simply receiving TANF or SNAP benefits does not exclude a customer study from the study.

**For customers requesting financial aid over \$200, which do we determine first -- study eligibility or full financial aid eligibility?**

Determine study eligibility first and complete random assignment before asking the customer to complete a full financial aid application.

**If a customer requests financial aid over \$200 through a call center, must he or she visit a Career Office?**

Yes. The customer must visit a Career Office to sign—in person—the study consent form, which is printed on special paper.

- In order to avoid referring a customer who is not eligible for the study to an office, call center staff must complete a Study Eligibility Checklist before making a referral.
- If a customer is *not* eligible for the study, call center staff will store the completed Study Eligibility Checklist to send to Mathematica. The call center staff can then continue working with that customer.
- If a customer *is* study eligible, the call center staff member will destroy the checklist after referring the customer to a physical office for study enrollment. Call center staff do not need to keep the checklists of eligible customers because those customers will complete the check list as part of a packet of forms when they visit the office.

After completing all the study forms and being randomly assigned to a study group by office staff, the customer may work with the call center or office FAS to establish eligibility for financial aid over \$200, if she is assigned to the study group that allows it.

**Are customers called-in off the wait list exempt from the study?**

No. Wait list customers are required to participate in the study. Customers who (prior to December 7, 2011) already had a TWIST record documenting ongoing receipt of financial aid over \$200 or a confirmed commitment for financial aid over \$200 already in FAMS were exempt from study participation.

**If a customer is likely to be put on the wait list, when do we complete study intake?**

Complete the study eligibility and random assignment before putting a customer on the wait list.

**How should customers assigned to the limited services groups be tagged in TWIST?**

For all customers, under the optional questions tab of the Intake Common, record the study group assignment in the fields marked “WIA Gold Standard Study.”

Example:

- For a customer randomly assigned to basic (core) only services – the only allowable service tags include: 81-Job Search Basic, 51-Job Development, 203-Transportation, 207-Other Support Services.

- For customers who are randomly assigned to basic (core) and expanded (intensive) *only* services – allowable service tracking includes:
  - 2 – Basic Education Skills/ABE
  - 7 - Internships
  - 8 – Comprehensive Objective Assessment
  - 12 – Job Search Assistance
  - 24 – Counseling
  - 38 – Job Readiness/Employment Skills
  - 44 – English as a Second Language
  - 47 – Unpaid Public Work Experience
  - 48 – Unpaid Non-profit Work Experience
  - 49 – Unpaid For-profit Work Experience
  - 50 – Subsidized Work Experience
  - 51 – Job Development
  - 54 – GED
  - 68 – Employability Development Plan
  - 81 – Job Search Basic
  - 82 – Short-term Educational Services
  - 84 – Short-term Work Readiness Services
  - 203-Transportation
  - 207-Other Support Services

**If a customer between the ages of 18 and 21 is assigned to one of the restricted service groups, can we provide them financial aid via WIA Youth?**

Tag eligible customers ages 18-21 as WIA Youth. If you tag the customer as WIA Adult, you must complete the study assignment and the customer could be assigned to one of the two limited services groups.

**How should office managers order additional study forms when supplies run low?**

Request additional study materials directly from Pat Nemeth at Mathematica – [pnemeth@mathematica-mpr.com](mailto:pnemeth@mathematica-mpr.com) or (609) 275-2294.

## Action

1. Make sure all staff are familiar with the basics of the study.
2. Make sure all Managers, Supervisors, Financial Aid Specialists and Personal Services Representatives understand the detailed procedures for determining customers eligible for the study, randomly assigning them to a study group, tracking the eligibility assignment in TWIST, and maintaining customers in their study groups.
3. Make sure staff continue enrolling customers in the study until we close study

enrollment.

4. Make sure staff know how to secure forms and when to submit study forms to Mathematica – and how and when to order a new supply of forms.

## Questions

Direct questions about this issuance through the electronic Q&A posted with the policy on the website at <http://www.wrksolutions.com/staff/policiesandprocedures.html>.

Direct questions about the WIA Gold Standard Evaluation to Ginger Rogers [ginger.rogers@wrksolutions.com](mailto:ginger.rogers@wrksolutions.com) or Michelle Ramirez [michelle.ramirez@wrksolutions.com](mailto:michelle.ramirez@wrksolutions.com).