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Te Manatū Whakahiato Ora

Phase 2 Evaluation of the Training Incentive Allowance

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Executive summary

Purpose of the evaluation

In 2001, the Ministry of Social Development (MSD) was directed to evaluate the Training Incentive Allowance (TIA). The evaluation was conducted in two phases. Phase 1 of the evaluation was completed in September 2002 and is available on the MSD website.

This report presents the findings of the second phase of the evaluation. It provides information about the operation of the TIA and uses administrative data to estimate the impact of TIA-assisted training on participants' outcomes.

Overview

The objective of the TIA is to improve participants' work skills, increasing their prospects of obtaining full or part-time employment and of gaining independence from the benefit. The evaluation findings suggest that the TIA is effective in meeting these objectives for Domestic Purposes Benefit (DPB) recipients but not for Invalids Benefit (IB) recipients.

Both DPB and IB clients who receive TIA-assisted training achieve positive outcomes such as increased self-confidence, wellbeing and interaction with others, irrespective of whether they move into employment. However, these types of outcomes are not recognised in the stated objectives of the TIA.

The success of the TIA in assisting people to participate in training and move into employment is affected by a range of factors, including health, course type, labour market factors and participants' circumstances.

Evaluation method

The second phase of the TIA evaluation used a mixed-method approach, using an analysis of the impact of the TIA using administrative data, focus groups with Work and Income case managers and interviews with previous TIA recipients.

The impact of the TIA was estimated by comparing the outcomes of TIA recipients with those of a similar group. A propensity matching technique was used to select matched comparison groups whose characteristics were similar to those of the TIA recipients. Propensity matching reduces bias owing to observable characteristics. A difference-in-difference technique was used to estimate the impact of the TIA on the outcomes of recipients. The difference-in-difference technique reduces bias owing to unobservable factors that are time-invariant.

Thirty-four former TIA recipients were interviewed. Of those interviewed, 21 (61.8%) were DPB recipients and 13 (38.2%) were IB recipients when they received the TIA. Four focus groups were conducted with Work and Income case managers who specialised in working with clients on an IB or DPB-type benefit. Case managers from the Auckland North, East Coast, Nelson and Canterbury regions participated in these focus groups.

Key findings – DPB recipients

TIA-assisted DPB participants spend less time on the benefit

DPB clients who use the TIA to obtain and complete training are significantly more likely to move into either full or part-time employment than those who do not. Earlier research and evaluation reported similar results. For instance, a 1989 evaluation found that the TIA helped DPB clients to move into employment (Harland, Harvey and Donnell, 1989). Both international and national research have demonstrated that individuals with education increase their likelihood of gaining employment (Colmar Brunton, 1995; HEFCE, 2002; Levine et al, 1993).

Over the six years studied, people who received the TIA in 1997 spent six months less on the DPB than the people in the comparison group. During that time period, DPB participants also spent 31 more weeks in part-time employment than the comparison group. It should be noted that DPB clients can remain on the DPB and work part-time.

TIA makes education achievable

Prior to receiving the TIA, many DPB recipients did not further their education because they felt it was financially out of their reach. Most DPB participants felt that they would not have undertaken training without the financial assistance provided by the TIA grant. In addition, many of those who obtained a job attributed it to their increased education and skill base. DPB participants also reported increased self-confidence and wellbeing, irrespective of whether or not they moved into employment.

Barriers are addressed, but some remain

Sole parents experience multiple barriers to participation in both training and employment, including age, number and health of children, access to childcare, low skills or qualifications, and limited work histories (MSD and Department of Labour [DoL], 2002; Wylie, 1980). Barriers can impact on an individual's ability to undertake or complete training and to move into employment. These barriers include:

- the ill health of children or other family members
- a mismatch between training and jobs available in the labour market
- an inability to find jobs that fit with ongoing family responsibilities
- a lack of work experience.

The TIA was designed to address some of the barriers faced by sole parents, including childcare, course and travel costs associated with training, and overcoming low skill levels. However, other barriers can prevent DPB clients from gaining the full benefit of training and moving into employment. Before undertaking training, clients need information to make well-informed choices about course types. While in training, clients need to be adequately supported by both training providers and their Work and Income case manager to ensure that any barriers are addressed. Finally, once a client has completed training, it is important to ensure that they receive additional employment assistance from Work and Income to support their movement into employment.

In March 2003, MSD introduced enhanced case management for DPB clients. Enhanced case management focuses on supporting clients into sustainable paid employment as their individual circumstances and parental responsibilities allow. To address barriers to employment, it uses mechanisms such as the introduction of a mandatory planning process, lower client-to-case manager ratios, a holistic client-driven assessment, and more comprehensive and proactive support. It is possible that enhanced case management will

result in the provision of more consistent and ongoing support throughout TIA participation, addressing some of the additional barriers outlined in this evaluation.

Key findings – IB recipients

TIA-assisted IB participants achieve some positive outcomes

IB clients who participate in the TIA are no more likely to move into full or part-time employment than those who do not participate. This is inconsistent with the finding that people with disabilities who have higher levels of education have an increased likelihood of moving into employment (Meager, Bates, Dench, Honey and Williams, 1998).

While the TIA is not effective in assisting the IB participant group, as a whole, to move into employment, it does assist some IB recipients into employment. In addition, participating in TIA-assisted training results in positive outcomes for IB recipients. The benefits of TIA-assisted training include increased self-confidence, self-esteem, sense of wellbeing and interaction with others. Most IB participants felt that they would not have undertaken training without the financial assistance provided by the TIA grant, as they felt that it would have been too expensive.

Barriers remain problematic

Recent research has shown that, like sole parents, people with disabilities face multiple barriers to moving into employment. Internationally and in New Zealand, people with disabilities are less likely to be in employment than people without disabilities (Fawcett, 1996; Burchardt, 2000; IES, 2000; Statistics New Zealand, 2002). People with disabilities face many of the same barriers as those without disabilities, in addition to barriers that relate specifically to their impairment (Burchardt, 2000).

The present evaluation found that IB clients experience multiple barriers to participation in both training and employment. When an IB recipient participates in TIA-assisted training, barriers may arise and impact on an individual's ability to undertake or complete training and to move into employment. These barriers include:

- ill health
- a mismatch between training and jobs available in the labour market
- an inability to find jobs that fit with their disability or impairment
- a lack of work experience.

As mentioned above, the TIA was designed to address only a small number of barriers faced by recipients and it is clear from this study that addressing these barriers is not sufficient to result in significant numbers of IB recipients moving into employment.

The present study was not able to determine why the TIA is ineffective in assisting IB recipients to move into employment. It is possible that the TIA does not provide sufficient assistance to overcome the range of barriers faced by people with disabilities, such as employer attitude and the need for a modified workplace. The OECD (2003) suggests that there is a need to assist people with disabilities through packages of assistance adapted to each individual's capacity and needs. It is also possible that the current requirement for individuals receiving the IB to demonstrate a long-term reduction in their ability to undertake more than 15 hours of paid employment per week may function as a disincentive to moving into employment.

Future evaluation work

Given that the TIA is not effective in assisting IB recipients to move into employment, there is a need to carry out further work to determine what forms of training assistance are effective for this client population. This is being done as part of the SB/IB research programme.

There is also a need to investigate whether the positive impact that TIA-assisted training has on DPB participants is likely to result in a reduction of income support expenditure.

Introduction

It was agreed[1] that the evaluation of the Training Incentive Allowance (TIA) be conducted in two phases. Phase 1 of the evaluation used data from the databases of the Ministry of Social Development (MSD) to provide a high-level quantitative description of TIA recipients, trends in TIA uptake and some information about the outcomes of recipients. Phase 1 was completed in 2002 and is available on MSD's website.

This report presents the findings of the second phase of the TIA evaluation and assesses whether the TIA is successful in increasing the likelihood that participants move into either full or part-time employment.

Background

In 1980, the Department of Social Welfare commissioned a report examining the effect of training and previous work experience on the participation of female sole parents in the workforce. The Wylie report (1980) examined the experience of female sole parents who had never received the DPB, female sole parents who had previously received the DPB and female sole parents who were receiving the DPB.

Sole parents who either had never received the DPB or were no longer receiving the DPB generally had work skills, qualifications and/or an established work history before becoming a sole parent. Women in these categories generally did not see a clash between working and raising a child and may already have had reliable and affordable childcare options. They also generally felt that work was enjoyable and stimulating.

Female sole parents who were on the DPB had typically been full-time "at home" mothers before becoming a sole parent and often had few work skills and little or no work experience. In addition, these sole parents had little experience of balancing employment with childcare responsibilities.

The report also found that access to reliable and affordable childcare was a problem and that employers often had negative attitudes towards sole parents, considering them unreliable.

The report suggested that employment prospects for sole parents with low skill levels, little work experience and restricted access to reliable and affordable childcare were bleak unless they were provided with training and encouragement to help them move into employment.

Introduction of the Training Incentive Allowance

The TIA was introduced in 1983 in response to the Wylie report. [2]

The TIA was designed to provide financial support to recipients of DPB-type benefits (DPB – sole parent, DPB – caring for the sick and infirmed, Emergency Maintenance Allowance, and the Widows Benefit) to allow them to undertake training that would:

- improve their work skills
- increase their prospects of obtaining full or part-time employment
- allow them to gain independence from the benefit.

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[1] *Training Incentive Allowance (TIA) – Review update*, April 2002.

[2] The TIA grant can be used to pay necessary and reasonable costs of attending a course, including costs associated with transport, childcare, tuition fees, books, stationery and other course materials. The grant is paid for actual costs faced by clients as a result of attending the course, up to a maximum of $81.98 for each week of the course, with an annual maximum of $3,279.20, as at April 2003.

In October 1985, TIA eligibility was extended to clients receiving the IB, in recognition that they also faced significant barriers to moving into employment.

Assumptions of the TIA

There are three main assumptions of the TIA:

- providing additional financial assistance will encourage sole parents and people with disabilities to undertake training
- providing training helps disadvantaged individuals to increase their likelihood of gaining employment
- the employment gained because of training will allow individuals to remain independent of a benefit.

Educational attainment has been found to be an important determinant of labour force participation (OECD, 1993) and there is a link between education and the likelihood of gaining employment (Colmar Brunton, 1995; Higher Education Funding Council for England, 2002; Levine, Wyn and Asiasiga, 1993). Specifically, it has been found that both sole parents and people with disabilities who have higher levels of education have an increased likelihood of moving into employment (Meager, Bates, Dench, Honey and Williams, 1998; Wylie, 1980). A previous evaluation of the TIA found that TIA-assisted training helped DPB clients move into employment and that, for those who were not in employment, the main reason was childcare obligations (Harland, Harvey and Donnell, 1989). The evaluation also found that TIA recipients reported positive outcomes other than employment. For example, individuals reported that they had gained direction or purpose, that they were better able to cope, that they had made friends or that they felt they provided a positive role model for their children.

There is a reasonable amount of literature that suggests that education and/or training allows individuals to move into higher paying employment. The UK's Department for Education and Employment (2003) recently found that individuals who have been through higher education earn on average 50% more than those who have not, irrespective of whether they successfully completed. In support of this, the evaluation of the DPB/WB reforms (MSD and DoL, 2002) found that individuals with no qualifications or only school qualifications were more likely to move into low paying jobs when they entered the labour market.

Sole parent disadvantage – recent findings

Many sole parents want to be financially independent and believe that employment is the best means to achieve this (Harris, 1996: Levine et al, 1993; Oliker, 1995). However, recent literature suggests that many of the barriers described by Wylie (1980) as disadvantaging sole parents and preventing them from moving into employment are still problematic. Wilson (1999) found that while most sole parents receive a benefit for only 27 months, female sole parents are likely to experience long-term or repeat benefit dependency. The literature cites several reasons why sole parents typically experience long-term or repeat benefit dependency.

The evaluation of the 1999 DPB/WB reforms (MSD and DoL, 2002) found that sole parents face a range of barriers to employment, including age, number of and health of children, access to childcare, low skills and/or qualifications, and limited or poor previous work history. Barriers like low skill level and limited work history impact on the type of work that sole parents are able to move into. For example, McLaughlin, Millar and Cooke (1989) found the type of work that is typically available to sole parents is often low paid and insecure in nature. This finding is supported by a New Zealand survey (MSD and DoL, 2002) of sole parents who had left the benefit, which found that about one-third were still receiving some form of financial assistance from Work and Income, suggesting that they were low-income earners. The wages from low paying jobs are often insufficient to meet the cost of caring for a family (Mink 1998)

and stretch the limited resources of sole parents (Mclaughlin et al, 1989) and may result in them returning to the benefit.

Sole parents face a dilemma between child rearing and breadwinning (OECD, 1993), with most mothers reporting that they feel that their childcare responsibilities prevent them from entering the labour market (Cherlin, 1995; Ministry of Women's Affairs, 2000). Sole parents must continuously manage the tension between their role as an employee at work and their responsibilities as primary caregiver at home (MSD and DoL, 2002). Sole parents may also find that some employers have an unsympathetic attitude towards their role as primary caregiver (Dixon, 2000; Levine et al, 1993; Wilson, 1995). Sole parents in employment who are struggling and feel that their working impacts negatively on their children may choose to return to the benefit to care for their children (Hungerford and Adam, 2001).

The evaluation of the 1999 DPB/WB reforms (MSD and DoL, 2002) also found that sole parents' resources were often scarce and their capacity to deal with changes such as failure of childcare, health and/or job changes were limited. The cost of childcare and other costs of entering employment also affect the extent to which sole parents are able to gain financially from employment and thus retain employment (MSD and DoL, 2002).

Some studies have found that factors like low self-esteem (Colmar Brunton, 1995; Levine et al 1993; Olsen and Pavetti, 1996; Pavetti, Olson, Nightingale, Duke and Issacs, 1997), low self-confidence (Colmar Brunton, 1995; Levine et al 1993) and mental health problems (Olsen and Pavetti, 1996; Pavetti et al, 1997) act as barriers to moving into and retaining employment. Balancing work and parenting commitments can also place significant pressure on sole parents and impact on their health and, as a result, on their ability to continue working (Albelda and Tilly, 1997).

IB disadvantage – recent findings

Internationally, studies have found that people with disabilities are less likely to be in employment than people without disabilities (Fawcett, 1996; Burchardt, 2000; Institute for Employment Studies, 2000). This was supported by a recent New Zealand study (Statistics New Zealand, 2002). Research has also found that many people with disabilities who are not currently in employment would like to be (Fawcett, 1996; Meager, Bates, Dench, Honey and Williams, 1998). However, recent studies have found that people with disabilities face a number of barriers when moving into employment.

Burchardt (2000) suggests that not only do people with disabilities face many of the same barriers to employment as people without disabilities (eg educational qualifications), but that they also face additional barriers that relate specifically to their impairment. The type of impairment experienced by people with disabilities impacts on the likelihood of participating in employment (Fawcett, 1996; Meager, et al, 1998). The severity and cause of an individual's disability also affect labour market participation, with individuals with severe disabilities less likely to be in employment (Fawcett, 1996). People with disabilities who are older are also less likely to be in employment, as are women with disabilities (Fawcett, 1996). In addition, individuals whose disability required an adapted working environment (eg building design, special office equipment or adapted working hours) were also less likely to be in employment (Fawcett, 1996).

People with disabilities are much more likely to work in manual, lower skilled jobs (Fawcett, 1996; Meager, et al, 1998) and are more likely to work in lower paid occupations (Fawcett, 1996; Meager, et al, 1998; Burchardt, 2000). In addition, Burchardt (2000) found that the greater the severity of an individual's impairment, the lower the income.

People with disabilities have lower qualifications, overall, than people without disabilities (Meager, et al, 2000). Meager et al (2000) also reported that there is a strong correlation

between educational qualifications and the likelihood of an individual with a disability being in employment: higher qualifications were associated with an increased likelihood of participating in employment. Fawcett (2002) suggested that education was the best way to help people with disabilities to move into employment.

In addition, employer attitude has been reported as a barrier to employment (DoL, 1991; Meager et al, 2000). Employer discrimination typically takes two main forms: one, employers assume that a job applicant without a disability is better able to do the job than an applicant with a disability; and two, employers focus on the applicant's disability rather than their abilities (Meager et al, 2000).

Summary of literature

The TIA was established in response to the finding that sole parents are significantly disadvantaged with respect to moving into employment. TIA eligibility was extended to clients receiving an IB in recognition that people with disabilities also face significant disadvantages to moving into employment. The literature indicates that sole parents and individuals receiving an IB are still disadvantaged to moving into employment and these groups thus continue to require assistance to overcome this disadvantage. The aim of the present study is to determine whether the TIA is effective in increasing the likelihood of recipients moving into either full or part-time employment.

Evaluation context

It was identified in an MSD briefing paper (25 October 2001) on the expenditure of the TIA that:

> There is limited information about the TIA in terms of research about how it is used, and evaluation about how effective the programme is in meeting its objectives. Officials recommend the TIA programme be reviewed. This involves undertaking research or an evaluation of the TIA, and reviewing the policy parameters, purpose and objectives of the TIA programme.

This lack of information was noted as a barrier to an informed policy analysis of the TIA. As a result, officials from MSD, in consultation with other relevant agencies, were directed to begin planning research and/or an evaluation of the TIA. This report has been prepared by MSD's Centre for Social Research and Evaluation (the Centre) at the request of MSD's Social Assistance Policy (SAP) group.

Purpose of the evaluation

This evaluation is intended to provide information for an informed policy review of the TIA. The SAP group requested that the evaluation provide information about the following key areas:

- targeting and eligibility criteria
- outcomes
- effectiveness.

For the evaluation, these information areas have been grouped into the four evaluation objectives that are detailed below.

Evaluation objectives

The evaluation objectives were to examine:

- how the TIA is being targeted to clients, including identifying who is accessing the TIA
- how the TIA is being used by recipients
- the outcomes achieved by TIA recipients, including their labour market outcomes and their subsequent uptake of benefit
- the effectiveness of the TIA in meeting its objectives.

Evaluation approach

It was agreed in April 2002 (in *Training Incentive Allowance (TIA) – Review update*, the report to the Minister of Social Services and Employment) that the evaluation be conducted in two separate phases. The first phase of the evaluation was completed in September 2002 and addressed the first three evaluation objectives. It used data from the MSD administrative databases to provide a high-level quantitative description of TIA recipients, trends in TIA uptake and some information about recipients' outcomes.

This report presents the findings of the second phase of the TIA evaluation, which aims to address the fourth evaluation objective. It used both quantitative and qualitative methods to provide information about the operation of the TIA and about TIA recipients, and to estimate the impact of the TIA on recipients' outcomes.

Methodology

This phase of the TIA evaluation used a multiple-methods approach. The methods used included an analysis of the impact of the TIA using administrative data, focus groups with Work and Income case managers and interviews with previous TIA participants. Each of these methods is described in general below, with a more detailed description provided in a separate Methodology report.

Measuring impact

To assess the impact of a programme on participants' outcomes, it is necessary to observe what the participants' outcomes would have been if they had not participated. As it is not possible to do this, the outcomes of a comparison group are used to provide an estimate of participants' outcomes without the programme.

When selecting a comparison group, it is important to be aware that it is unlikely that all participants will be affected in the same way by the programme and factors other than programme participation may influence outcomes. For example, an individual's history and characteristics will also influence their outcomes. Differences in characteristics between the participant and the comparison group are termed "selection bias". Bias is problematic when a factor or characteristic that influences outcomes is unevenly distributed between the participant and comparison groups. When this occurs, differences in outcomes between the participant and comparison groups may be due to the different distribution of characteristics rather than to participation in the programme.

The present study addressed this issue by constructing a comparison group that was similar to the participant group, except that they did not participate in the programme. A propensity matching technique was used to select the comparison groups. The aim of propensity matching is to construct a comparison group that closely resembles the participant group in terms of observable characteristics. Propensity matching uses individuals' observable characteristics to predict the likelihood of them participating in the programme. Non-participants were then selected into the comparison group because they had a similar predicted likelihood of participating given their observed characteristics.

Assuming that propensity matching largely controls for bias due to observable factors, it is unlikely to control for bias due to unobservable factors. However, additional statistical techniques can be used to help control for changes in outcomes that are due to unobservable factors. The present study used a Difference-in-Difference (DiD) technique, which helps to control for unobservable factors that are time-invariant.

Outcome measures

Two outcome measures were used for the present impact analysis:

- a measure of independence from Work and Income assistance, which provides an indication of movement into employment
- a measure of declared earnings from work, which provides an indication of movement into part-time employment.

Both outcome measures were constructed using information from MSD's administrative databases.

Movement into employment – independence measure

While movement into employment is the outcome of interest for the present study, this information is not available in MSD's administrative data. The measure used here provides a

proxy for movement into employment termed “independence from Work and Income assistance”. “Independence” is defined as no longer receiving assistance from Work and Income, where “assistance” includes receiving a core benefit or participating in an employment programme. An individual is still defined as independent of Work and Income assistance if they are receiving supplementary or non-beneficiary assistance but are either not receiving a core benefit or not participating in an employment programme. This measure has been used to evaluate the impact of employment programmes; it is considered robust and is able to be applied to both participants and comparisons without risk of bias (de Boer, 2003a). The main problem with this outcome measure is that it lacks specificity with respect to the outcome achieved. That is, while it is clear that an individual is no longer being supported or assisted substantively by Work and Income, it is not clear whether this is due to movement into employment or to other outcomes (eg re-partnering, exiting the labour market, emigration, prison). The assumption made when using this outcome measure is that any differences in the probability of being independent of Work and Income assistance between participants and comparisons are due to underlying changes in the probability of being in employment rather than changes in the likelihood of other outcomes occurring.

Movement into part-time employment – part-time employment measure

Part-time employment is defined by MSD as working 15 hours or more per week. While the present study also aims to measure movement into part-time employment, this information is not available in MSD’s administrative data. The measure used here provides an indicator or proxy for movement into part-time employment, termed the “part-time employment measure”. This outcome measure determines whether a person was working part-time while receiving a core benefit. A person was defined as working part-time if they had declared earnings, from work, that were over $80.00 per week. This level of declared income was chosen as the point at which an individual was defined as in part-time employment as it corresponds to the point at which an individual’s benefit was abated. While this level is relatively low and is likely to capture some individuals who are working less than 15 hours, the assumption is made that most individuals who are declaring over the abatement rate are likely to be working part-time rather than just supplementing or maximising their weekly income.

Participants

Individuals whose first TIA participation occurred in either 1997 or 1998 formed the participant groups for the impact analysis. The participants were divided into four separate groups for the impact analysis: 1997 DPB participants, 1997 IB participants, 1998 DPB participants and 1998 IB participants.

Selecting the comparison groups

The comparison groups were obtained from a pool of clients who had received either the DPB or the IB at some time during 1997 or 1998. A random sample of non-participants was selected from this pool and the propensity matching technique was then used to select groups of non-participants whose observable characteristics looked like those of the participant groups. The characteristics that were used to determine propensity to participate were: age, gender, age of youngest child, number of children, educational qualifications, benefit type and region. Four comparison groups were selected: a 1997 DPB comparison group, a 1997 IB comparison group, a 1998 DPB comparison group and a 1998 IB comparison group. Once each matched comparison group had been determined, it was necessary to assign each individual a programme start date, or proxy participation date, which occurred during the year for which they were a non-participant. For each individual, a record of current spells in receipt of benefit during the appropriate year (either 1997 or 1998) was constructed and a date which occurred during one of these spells was randomly selected as their programme start date.

Case manager focus groups

This component of the evaluation consisted of a series of four focus groups conducted with Work and Income case managers who specialised in working with clients on an IB or DPB-type benefit. Case managers in each of the Auckland North, East Coast, Nelson and Canterbury regions were invited to participate in the focus groups, with a maximum of 8–10 to participate in total. The focus groups took around two hours and case managers were asked to discuss the following issues:

- who participates in the TIA
- what type of courses participants undertake and what type of outcomes they get
- what changes they would like to make to the TIA.

Interviews with previous TIA participants

This component of the evaluation consisted of face-to-face interviews with randomly selected clients who participated in the TIA in the Auckland North, East Coast, Nelson or Canterbury regions during 1997 or 1998. Each interview took around 45 minutes to complete. Thirty-four former TIA participants were interviewed, of which 21 (61.8%) were DPB recipients when they received the TIA and 13 (38.2%) were IB recipients. Eleven (52.4%) of the DPB clients interviewed were in employment when interviewed, as were nine (69.2%) of the IB clients.

Findings

This section reports the findings of the estimated impact of the TIA on the outcomes of participants. The overall impact of the TIA on participants is presented for both the independence measure and the part-time employment measure. The analysis also examines whether the outcomes vary according to who participates, ie whether outcomes vary according to the characteristics of individuals. The findings for the IB and DPB-type groups are presented separately.

This section also presents the findings of the qualitative component of the evaluation. Information from the case manager focus groups and the interviews with former recipients has been integrated to provide a description of the factors that affect the ability of participants to undertake or complete training and their ability to move into employment.

Impact of the TIA on DPB clients

Independence measure

DPB clients who participated in the TIA in either 1997 or 1998 subsequently spent significantly ($p < 0.05$) less time dependent on Work and Income assistance than those in their comparison group. The programme effect was estimated to be 0.082 for the 1997 DPB participant group. This indicates that participants spent, on average, 8.2% less time dependent on Work and Income assistance between their participation start date and the end of 2002 than the 1997 comparison group. This percentage difference equates to the participant group spending approximately 25 additional weeks independent over the study period. For the 1998 DPB participants, the programme effect was estimated to be 0.061, indicating that participants spent on average 6.1% less time dependent on Work and Income assistance between their participation start date and the end of 2002 than the 1998 comparison group. This percentage difference equates to the participant group spending approximately 15 additional weeks independent over the study period. These findings suggest that participating in the TIA increases the amount of time that individuals spend independent of Work and Income assistance and thus increases the probability of being in employment. The difference in the impact of the TIA for the 1997 and 1998 participants may be due to the shorter period over which outcomes were measured for the 1998 participant group.

Part-time employment indicator

DPB clients who participated in the TIA in either 1997 or 1998 subsequently spent significantly ($p < 0.05$) more time in part-time employment than those in their comparison group. The programme effect for the 1997 participant group was estimated to be 0.103. This indicates that participants spent, on average, 10.3% more time in part-time employment between their participation start date and the end of 2002 than those in their comparison group. This percentage difference equates to the participant group spending approximately 31 additional weeks in part-time employment over the study period. The programme effect for the 1998 participant group was estimated to be 0.092. This indicates that this group of participants spent, on average, 9.2% more time in part-time employment between their participation start date and the end of 2002 than those in their comparison group. This percentage difference equates to the participant group spending approximately 23 additional weeks in part-time employment over the study period. These findings suggest that participating in the TIA increases the probability that individuals who remain dependent on Work and Income assistance will move into part-time employment.

Impact by subgroup or participants' characteristics

The following section presents two types of analysis by participants' characteristics. The first is a "within group" analysis and the second is "between groups" analysis. These types of analysis are only undertaken where there is a significant main or overall effect.

"Within group" analysis examines whether there are differences in outcomes within the participant group or the comparison group for a particular characteristic and whether outcomes vary for different types of participants. For example, this type of analysis could be used to determine whether there is a difference in the outcomes of participants with respect to their gender or level of education. For this type of analysis, the average is calculated for one characteristic (eg the average outcome for individuals with "no school qualifications") and is then compared with the average outcome for all other levels of that characteristic (eg the average outcome for individuals who have "School Certificate", "secondary above SC" or "post school" qualifications).

"Between groups" analysis examines whether the outcomes of participants with a particular characteristic differ from those of individuals in the comparison group with the same characteristic, eg whether the outcomes of participants who have no school qualifications differ from the outcomes of those in the comparison group who have no school qualifications. Thus, between groups analysis examines whether the impact of the programme, or the difference in outcomes between treated and untreated individuals, varies by characteristic. This analysis can be used to examine whether the programme is particularly effective for individuals with a particular characteristic.

Independence measure

Within group analysis
The findings presented in Table 4 (see Appendix) show that there were no significant within group differences in time spent independent of Work and Income assistance for either the 1997 or the 1998 participant groups for any characteristic or by course or provider type. This suggests that the percentage of time spent independent did not differ depending on differences in participants' characteristics.

Between groups analysis
Table 1 shows the findings of the between groups analysis by characteristics. These findings show that the impact of the TIA on independence differed between the participant and comparison groups for both 1997 and 1998, depending on characteristics. The characteristics for which there were significant differences in impact are shaded and marked with an asterisk (*). The table shows, for each characteristic, the estimated programme effect. Where there were significant results, the estimated difference in the percentage of time spent independent between the two groups is shown in brackets. The percentages shown in brackets represent how much less time participants with that characteristic spent dependent on Work and Income assistance than individuals in the comparison group with the same characteristic.

For both 1997 and 1998, impact varied by age (20 to 24 years, 25 to 29 years and 30 to 39 years), ethnicity (European) and level of qualification (secondary above SC). For 1998, the impact also varied depending on the age of an individual's youngest child (6 to 13 yrs) and the region in which an individual participated (Auckland North, Auckland Central and Wellington). This suggests that the TIA is more effective at helping some clients become independent of Work and Income assistance than others, depending on their characteristics.

The likelihood of a participant becoming independent of Work and Income assistance does not appear to differ significantly depending on characteristics but the impact of the TIA on this does. That is, although all participants achieve similar outcomes, individuals with some characteristics were equally likely to end up independent irrespective of whether or not they had participated in the TIA.

Table 1: ***Between group impact of TIA participation on time spent independent of Work and Income assistance for DPB clients, by subgroup***

		1997		1998	
		Estimate	**Standard Error**	**Estimate**	**Standard Error**
Age	15 to 17 yrs	–0.023	0.013	0.008	0.015
	18 to 19 yrs	0.006	0.003	0.004	0.030
	20 to 24 yrs	*–0.069 (7%)	0.030	*–0.085 (8%)	0.023
	25 to 29 yrs	*–0.041 (4%)	0.013	*–0.065 (6%)	0.016
	30 to 39 yrs	*–0.123 (12%)	0.023	*–0.134 (13%)	0.027
	40 to 49 yrs	0.004	0.005	–0.003	0.008
	50 to 54 yrs	0.002	0.021	–0.012	0.031
	55 to 59 yrs	0.009	0.009	0.006	0.029
	+60 yrs	0.003	0.005	0.004	0.007
Gender	Female	0.004	0.007	–0.011	0.009
	Male	0.009	0.025	–0.020	0.030
Ethnicity	European	*–0.121 (12%)	0.021	*–0.221 (22%)	0.032
	Māori	0.003	0.018	0.006	0.006
	Pacific peoples	0.002	0.016	0.017	0.011
	Other	0.015	0.008	0.006	0.023
Age of youngest child	0 to 5 yrs	0.017	0.007	0.009	0.003
	6 to 13 yrs	0.007	0.014	*–0.017 (2%)	0.022
	14+ yrs	0.021	0.021	0.004	0.019
	No child	0.011	0.013	0.003	0.011
Qualifications	None	0.004	0.032	–0.001	0.028
	School Certificate	0.006	0.005	0.004	0.007
	Secondary above SC	*–0.058 (6%)	0.023	*–0.104 (10%)	0.038
	Post school	0.014	0.021	–0.023	0.017
Region	Northland	–0.002	0.017	0.012	0.024
	Auckland North	–0.004	0.036	*–0.055 (6%)	0.032
	Auckland Central	0.005	0.052	*–0.064 (6%)	0.047
	Auckland South	0.011	0.033	0.004	0.028
	Waikato	0.003	0.041	0.007	0.053
	Bay of Plenty	0.013	0.082	–0.031	0.071
	Taranaki	0.009	0.063	0.017	0.042
	East Coast	–0.014	0.012	–0.006	0.009
	Central	–0.024	0.113	0.011	0.103
	Wellington	0.007	0.204	*–0.101 (10%)	0.222
	Nelson	0.005	0.211	0.004	0.091
	Canterbury	–0.011	0.055	0.008	0.037
	Southern	–0.009	0.023	–0.011	0.011

Part-time employment measure

Within group analysis
The findings presented in Table 2 show that, for both 1997 and 1998, there were some significant within group differences in the time spent in part-time employment depending on characteristics. The characteristics for which there were significant differences between the outcomes of the participants and the comparison groups are marked with an asterisk (*). The table shows, for each characteristic, the estimated programme effect. Where there were significant results, the estimated difference in the percentage of time spent in part-time employment between the two groups is shown in brackets. The percentage shown in brackets represents how much more time participants with that characteristic spent in part-time employment than individuals in the comparison group with the same characteristic.

For 1997, participants' outcomes differed depending on the age of an individual's youngest child (6 to 13 yrs) and ethnicity (European and Māori). For 1998, there were additional differences in outcomes depending on ethnicity (European) and level of qualification (School Certificate and Secondary above SC). This suggests that part-time employment outcomes differ depending on some characteristics and that some participants are more likely to spend an increased percentage of time in part-time employment than others.

Table 2: *Within group differences in part-time employment outcomes for DPB participants*

		1997		1998	
		Estimate	**Standard Error**	**Estimate**	**Standard Error**
Age	15 to 17 yrs	–0.002	0.036	0.004	0.032
	18 to 19 yrs	–0.007	0.004	0.003	0.006
	20 to 24 yrs	0.004	0.021	0.061	0.024
	25 to 29 yrs	0.006	0.014	0.034	0.007
	30 to 39 yrs	0.010	0.008	0.001	0.012
	40 to 49 yrs	0.038	0.019	0.003	0.030
	50 to 54 yrs	0.009	0.004	0.006	0.009
	55 to 59 yrs	0.007	0.003	0.011	0.057
	+60 yrs	0.003	0.004	0.030	0.044
Gender	Female	0.011	0.051	0.035	0.042
	Male	0.008	0.009	0.006	0.011
Ethnicity	European	0.010* (1.0%)	0.007	0.034* (3.4%)	0.005
	Māori	0.011* (1.1%)	0.009	0.004	0.018
	Pacific peoples	0.006	0.007	0.006	0.042
	Other	0.007	0.009	0.011	0.006
Age of youngest child	0 to 5 yrs	0.008	0.058	0.004	0.039
	6 to 13 yrs	0.022* (2.2%)	0.015	–0.007	0.030
	+14 yrs	0.006	0.013	–0.007	0.021
	No child	0.007	0.004	–0.003	0.008
Qualifications	None	–0.007	0.021	0.001	0.009
	Post school	–0.006	0.064	0.008	0.054
	School Certificate	0.035	0.102	0.013* (1.3%)	0.006
	Secondary above SC	0.021	0.017	0.045* (4.5%)	0.004
Region	Northland	0.008	0.058	0.023	0.008
	Auckland North	0.043	0.006	0.007	0.004
	Auckland Central	0.006	0.030	0.019	0.041
	Auckland South	0.003	0.021	0.022	0.028
	Waikato	0.001	0.005	0.004	0.009
	Bay of Plenty	0.005	0.006	0.003	0.004
	Taranaki	–0.009	0.007	–0.020	0.012
	East Coast	–0.024	0.028	–0.008	0.030
	Central	0.005	0.015	–0.003	0.009
	Wellington	0.003	0.006	–0.004	0.004
	Nelson	0.039	0.037	0.006	0.028
	Canterbury	0.022	0.031	0.034	0.037
	Southern	0.004	0.008	0.002	0.005

Between groups analysis

Table 3 shows the findings of the between groups analysis, by characteristics, for the part-time employment measure. These findings show that the impact of the TIA on part-time employment outcomes differed between the participant and comparison groups for both 1997 and 1998, depending on characteristics. The characteristics for which there were significant impacts are marked with an asterisk (*). The table shows, for each characteristic, the estimated programme effect. Where there were significant results, the estimated difference in the percentage of time spent in part-time employment between the two groups is shown in brackets. The percentage shown in brackets represents how much more time participants with that characteristic spent in part-time employment than individuals in the comparison group with the same characteristic.

For both 1997 and 1998, the impact varied by age (20 to 24 yrs, 25 to 29 yrs and 30 to 39 yrs), ethnicity (European and Māori), level of qualifications (School Certificate and Secondary above SC) and age of youngest child (0 to 5 yrs and 6 to 13 years). For 1997, the impact of the TIA also varied by ethnicity (Pacific peoples), while for 1998, impact also varied depending on age (18 to 19 years). This suggests that the TIA is more effective at helping some clients move into part-time employment than other clients, depending on their characteristics.

Table 3: *Between group impacts of TIA participation on time spent in part-time employment for DPB clients, by subgroup*

		1997		1998	
		Estimate	**Standard Error**	**Estimate**	**Standard Error**
Age	15 to 17 yrs	0.069	0.058	0.002	0.007
	18 to 19 yrs	0.002	0.003	*0.011 (1%)	0.011
	20 to 24 yrs	*0.059 (6%)	0.023	*0.020 (2%)	0.003
	25 to 29 yrs	*0.037 (4%)	0.003	*0.051 (5%)	0.023
	30 to 39 yrs	*0.017 (2%)	0.002	*0.044 (4%)	0.006
	40 to 49 yrs	0.004	0.004	0.003	0.023
	50 to 54 yrs	0.003	0.007	–0.007	0.007
	55 to 59 yrs	–0.012	0.013	0.010	0.009
	+60 yrs	0.008	0.011	0.023	0.040
Gender	Female	0.007	0.006	0.005	0.008
	Male	0.012	0.062	0.004	0.012
Ethnicity	European	*0.017 (2%)	0.002	*0.021 (2%)	0.013
	Māori	*0.016 (2%)	0.004	*0.014 (1%)	0.007
	Pacific peoples	*0.021 (2%)	0.005	0.010	0.008
	Other	–0.008	0.019	0.003	0.054
Age of youngest child	0 to 5 yrs	*0.011 (1%)	0.023	*0.023 (2%)	0.031
	6 to 13 yrs	*0.023 (2%)	0.005	*0.037 (4%)	0.024
	14+ yrs	–0.009	0.007	0.009	0.076
	No child	0.010	0.040	0.003	0.045
Qualifications	None	0.072	0.049	0.032	0.035
	Post school	0.031	0.071	0.051	0.044
	School Certificate	*0.026 (3%)	0.006	*0.018 (2%)	0.010
	Secondary above SC	*0.019 (2%)	0.009	*0.024 (2%)	0.007
Region	Northland	0.004	0.021	0.009	0.038
	Auckland North	0.008	0.014	–0.017	0.022
	Auckland Central	–0.017	0.007	–0.032	0.004
	Auckland South	–0.034	0.011	0.021	0.014
	Waikato	0.027	0.054	0.007	0.061
	Bay of Plenty	0.008	0.036	0.066	0.041
	Taranaki	–0.022	0.027	–0.001	0.022
	East Coast	0.008	0.043	–0.007	0.031
	Central	0.003	0.017	0.032	0.050
	Wellington	0.027	0.008	0.002	0.006
	Nelson	0.034	0.055	0.011	0.047
	Canterbury	0.019	0.009	0.009	0.010
	Southern	–0.005	0.036	0.014	0.028

Impact of the TIA on IB clients

IB clients who participated in the TIA in either 1997 or 1998 did not subsequently spend significantly ($p < 0.05$) less time dependent on Work and Income assistance or significantly more time in part-time employment ($p < 0.05$) than those in their comparison group.

These findings suggest that participating in the TIA is not effective in decreasing the percentage of time spent independent of Work and Income assistance or in increasing the percentage of time spent in part-time employment for IB participants.

As the overall effects were not statistically significant, no further analysis of the impact of the TIA on the outcomes of IB participants by characteristics was undertaken, as it would not be statistically valid.

Qualitative findings

Why clients want to use the TIA to undertake training

Interviews with former TIA recipients suggest there are three main reasons why clients want to participate in training:

- to be "self-sufficient and financially independent"
- to be "independent of the welfare system"
- to support themselves and their families through "well-paid employment".

There was a general view that this would allow them to have a "much better future".

Many former recipients decided to train so they could "get some skills" or qualifications that they felt either were required by the labour market (eg computer skills) or would help them move into a particular job (eg nursing). In general, former recipients felt that they wanted to "gain better employment" and that a "qualification [was] required to improve employment opportunities". Some individuals wanted to complete training or qualifications that they had started before moving onto a benefit. For example, one client said that they were "studying … prior to falling pregnant, applied for the DPB and continued with [their] studies".

Some former TIA recipients (generally IB clients) wanted to train as they felt that it would "improve their self-esteem", their self-confidence and/or their sense of wellbeing. In addition, some clients felt that TIA-assisted training was about "interacting with other people and stimulating [their] mind".

Factors that affect a client's decision to undertake training

An individual's decision to train is mainly effected by their circumstances and whether or not they feel ready and able to undertake training. Case managers felt that many clients who move onto a benefit have done so because of a significant change in their circumstances, eg the breakdown of a marriage or a serious illness. They felt that clients often needed to go through a period of adjustment before they felt that they were ready or that their circumstances allowed them to undertake training. While some clients who participate in the TIA are self-motivated and approach case managers about training, with others, "you have to plant the seed".

Sometimes, case managers work with clients over a long period, encouraging them to participate in training and working through issues like low self-esteem, until the client feels that they are ready to undertake training. Case managers felt that some clients need to overcome additional barriers, like drug or alcohol addiction, before they were ready or able to use the TIA to undertake training.

Most former recipients felt that they would not have undertaken training without the financial assistance provided by the TIA grant, as they felt that it would have been to expensive. Key factors which impact on a client's decision to undertake training include the following:

- **Age of youngest child**
  For DPB clients particularly, former TIA recipients and case managers both felt that the age of an individual's youngest child had an impact on when clients decided that it was appropriate or that they were able to undertake training. Clients were affected differently by the age of their youngest child. Some former TIA recipients wanted to train while their child was pre-school (under the age of 5) so their training was completed when their child started school, which is when they felt it would then be appropriate for them to move into employment. Other former recipients and many of the case managers interviewed felt that it was better to wait until their youngest child had started school before they began training. A small number of former recipients had decided that they would not undertake training until their children were older, eg at intermediate or at least 14 years old.

- **Health and disability**
  For IB clients, former TIA recipients and case managers both felt that an individual's disability or health had a major impact on whether an individual felt ready and/or able to undertake training. Both also felt that it was important that an individual's health or disability condition was stable before a client utilised the TIA to undertake training, in order to ensure that they were able to participate in or complete the training. For example, one client said that an episode of illness might last 6–8 weeks and that they had taken this into account when deciding to undertake training. Sometimes individuals had been unable to continue working in their previous job because of a change in their health or disability. For example, one client who had severe arthritis was no longer able to work in their previous job, which needed a high level of manual dexterity. In such cases, former recipients and case managers both felt that such individuals may wish to retrain to move into employment that was more suitable to their current circumstances.

- **Support from family**
  Family circumstances, other than childcare or health and disability, can have an impact on whether a client feels ready or able to undertake training. Case managers and former TIA recipients both felt that it was easier for an individual to consider undertaking training if they had a supportive family who provided either practical support, like childcare, or moral support and encouragement. For example, one client said that "because of support from family, having a baby did not affect decision to train".

- **Distance from training provider**
  In some areas, location can also be a barrier to participation in training, eg an individual may wish to train but live too far away from the nearest training providers for it to be practical. An individual in this situation can choose to study by correspondence, but some case managers felt that studying by correspondence would not provide the supportive training environment required by some TIA recipients, eg those with low levels of education.

Types of training undertaken by TIA recipients

TIA recipients participate in a wide range of training courses. Case managers felt that it was common for clients, particularly DPB clients, to do social service type courses, such as counselling, teaching and nursing. Foundation skill courses (eg computer training) were also seen as common. This point was well captured by one case manager who remarked that foundation courses were especially useful for clients with limited educational attainment to "get them up to speed" with employment requirements.

Some of the former TIA recipients interviewed indicated that they had participated in office or business administration courses, or in basic computer courses. These courses were typically

short in duration and helped the individuals develop a range of skills to increase employability. University courses were also common and were regarded by both case managers and clients as useful for gaining employment. There was also general agreement among case managers that courses that contained a built-in work experience component, like nursing or teaching, increased the chances of getting a job.

According to case managers, IB recipients generally participate in the same types of courses as DPB recipients, although some IB recipients participate in courses to improve their quality of life. In such cases, case managers felt that employment outcomes were peripheral to the improved sense of wellbeing gained by these TIA recipients. For some IB recipients, the TIA was used to retrain for new employment, especially for those who had been unable to continue working in their previous job because of a change in their health or disability.

Some case managers felt that clients varied in their ability to make realistic and appropriate decisions about their training options. This occurred when TIA recipients did not adequately plan and/or seek career advice about the suitability of the course. For instance, while hospitality training may result in positive employment outcomes, the hours of work are often not "child-friendly". Most case managers felt that it was also important to consider labour market factors, such as the availability of work in particular occupations, when clients decide what type of course to undertake. Case managers generally felt that career counselling was a valuable process that helped clients to work through these types of issues before enrolling and to make informed decisions about their course of study. Some case managers suggested that all clients should be required to undergo career counselling when applying for the TIA. They felt that this would ensure that clients have access to relevant information and that they make well-informed choices.

Case managers also felt that a small minority of TIA recipients "course hopped", constantly enrolling in different training programmes, and that this did not generally result in sustainable employment.

Factors affecting completion

TIA assistance is intended to overcome barriers to entering training such as the cost of childcare, transport and fees. However, these barriers may not always be sufficiently addressed by the TIA payment alone and therefore may continue to act as a barrier to participating in and completing training. There are also other issues that emerge for clients once they have started their study that impact on whether they are able to complete and/or pass their training course.

The main reason TIA recipients gave for non-completion was that they found the course too difficult or were unprepared for the level of difficulty given their other responsibilities. Some clients felt that they failed their training course because they had taken on "too much too soon" or because they were unaware of how hard the course would be or misinformed about programme content.

Case managers suggested "small steps to start with" and thought that foundation and bridging courses were important to minimise the likelihood of recipients dropping out of their study, with literacy and numeracy deficits often being a problem for clients returning to formal training, perhaps after extended periods. Case managers also said that they see training as a first step in a longer process to employment, and that sometimes life-skill courses are a useful starting point. These courses are often tailored to any special needs that clients might have, eg the courses may be part time and less intensive or demanding in comparison with other courses.

Case managers felt that a client's commitment to training is an important determinant of success. They also felt that some TIA recipients fail because they have taken up training that they did not really want to do – "people who participate for reasons other than their own wish –

they fail most often". Some case managers suggested that some clients should do a training opportunities course or introductory course first to test their abilities and interest in study.

Lack of support from tutors or case managers was another reason given for non-completion. Some case managers felt that it was important to provide ongoing support to clients while they were in training ("you need to try and keep clients focused" and "clients need to be encouraged"), but high caseloads can affect their ability to do so ("high caseloads don't allow time to follow up with TIA recipients to see how they are going").

TIA recipients and case managers both said that extramural or correspondence courses did not always provide enough support for students – one TIA recipient interviewed said it was "really hard by correspondence, felt isolated". One IB recipient felt particularity disadvantaged when doing a computer course and said there was "not enough support from tutors for people with disabilities".

Both IB and DPB TIA recipients who were interviewed stated that health problems had affected their ability to complete their training. One client said that she "became unwell, couldn't cope". Contrary to this, case managers felt that health did not have a great impact on the ability of DPB recipients to complete training, but that family circumstances, such as the ill health of their children, did. Case managers said that IB clients, in particular, needed to factor in relapses when considering training because their condition may not be stable either in the long or short term. A small number of the TIA recipients interviewed said that childcare and financial issues caused them to leave their course. Some former recipients felt that enough support enabled them to overcome difficult family circumstances and complete their training.

Employment

Most former TIA recipients who moved into full-time employment said the training they had undertaken had helped them to move into either a previous job or their current job, it having provided them with necessary skills or qualifications, or increased self-esteem or self-confidence and helped them to build networks. Case managers also felt the TIA was a useful tool and effective in helping clients move into employment, if it was used properly.

Some former TIA recipients move into part-time employment rather than full-time employment. This may be a result of personal circumstances or external factors. Personal circumstances that resulted in clients working part time rather than full time included childcare responsibilities and impairment. External factors that resulted in clients working part time included remuneration and set hours – "would if offered better pay", "current job does not offer full-time hours".

Factors affecting movement into employment

Once clients have completed training, there are several factors that impact on their ability to move into employment, even though they now have additional qualifications or skills. Clients and case managers both felt that finding a job that fitted with an individual's continuing childcare responsibilities and/or impairment was important and that if individuals were unable to find such a job, they may remain unemployed. Case managers felt that it was important to encourage clients to consider the type of employment that was likely to result from a course before undertaking training, and also how it would fit with their childcare responsibilities or impairment. For example, if a sole parent wanted to train as a chef or bartender, they needed to take into account that these jobs may require them to work at night, which would mean that formal childcare options were limited. Case managers also felt that if an individual moves into a job that does not fit with their childcare responsibilities or impairment, they are unlikely to remain in employment.

Case managers also felt that, when deciding on a course of study, clients needed to take into account whether the employment likely to result from the course pays well enough for them to

remain financially independent of the benefit. If a client trains and then moves into a low-paid job, they may well return to the benefit. This consideration is reflected in the finding that some of the former recipients interviewed wanted to be able to move into well-paid employment. Case managers suggested that clients should be encouraged to train for jobs where there is opportunity for progression. They felt these types of jobs were more likely to provide sustainable employment and allow individuals to remain financially independent. Case managers felt that some of their IB clients were not able to work full time and therefore needed to be able to find part-time employment.

Case managers also felt that using the TIA to undertake and complete training was not all that was required for clients to be able to move into employment. Case managers felt that clients will often continue to find it difficult to move into employment, even when qualified, if they do not also have practical or work experience in that area of employment. This suggestion is reflected in the finding that some of the former TIA recipients interviewed felt that they had not moved into employment after completing their training as they lacked practical experience. As a result, case managers felt that clients who undertook courses with an inbuilt practical component, like that included in teaching or nursing courses, generally found it easier to move into employment than clients whose courses contained no practical component. In addition to this, some clients felt that they were unable to move into employment because they lacked confidence in their abilities.

Another factor that may prevent individuals from moving into employment is whether or not there is work available that suits the skills or qualifications that they now have as a result of receiving the TIA and undertaking training, ie whether the skills and/or qualifications gained because of training match with the requirements of the labour market. Some former recipients felt that they had been unable to find employment because there were no suitable jobs available, given their course of study. Case managers felt that it was important to consider this factor when clients were deciding what training to undertake.

Outcomes other than employment

Case managers and former TIA recipients generally agreed that TIA-assisted training lead to positive outcomes other than employment. It was generally felt that participation and completion of training resulted in increased confidence and self-esteem. Additional flow-on effects of participation included improved feelings of self-worth and achievement. These, in turn, were seen as often having a positive influence on others in the household.

For many clients, participation in the TIA resulted in “increased interaction with others” and increased social networks. There was general agreement that participation was an important part of improving a client’s sense of wellbeing. For example, when one former recipient was asked whether they felt better off because of their TIA-assisted training, they said “yes, [they were in] good secure employment, [with] excellent [and] ongoing challenging work”. Other former TIA recipients reported that they had “increased confidence and knowledge in [the] area of work”, were better off “financially”, or that their “family life has improved”.

For many clients and case managers, the principal goal of TIA participation was to help clients move off the benefit and into employment. However, for some IB clients, case managers felt that it was not always realistic to expect them to be able to move into employment, that it was equally important to consider the value of these types of outcomes, especially for IB clients, and the expectation of an “employment outcome may be stopping some [IB] clients from participating”. For other IB clients, case managers felt that part-time employment may be a more realistic option.

Discussion of findings

Overall impact of the TIA

Overall, the findings of the impact analysis suggest the TIA is effective in increasing the likelihood that DPB recipients move into either part or full-time employment. This finding is consistent with that of the previous TIA evaluation, which found that TIA-assisted training helped DPB clients to move into employment (Harland et al, 1989). However, the findings of the impact analysis suggest that the TIA is not effective at moving IB participants into either full or part-time employment. However, the qualitative component of the evaluation showed that, while there was no significant impact, some former IB recipients do move into employment after participating in the TIA.

The qualitative findings also showed that both DPB and IB TIA recipients who were in employment generally felt that this was a result of TIA-assisted training that they had undertaken. The evaluation also found that individuals who undertake TIA-assisted training achieve positive outcomes irrespective of whether they move into employment. Positive outcomes, other than employment, included: increased self-confidence, an increased sense of wellbeing, increased interaction with others and a sense that their participation may also have had a positive influence on others in their household. In general, most clients felt that, overall, they were better off because of undertaking TIA-assisted training.

Thus, for DPB participants, the findings suggest that not only is the TIA effective in increasing the likelihood of movement into full or part-time employment but that TIA participation also results in positive outcomes other than employment. For IB participants, the findings suggest the likelihood of moving into full or part-time employment was not significantly improved by TIA participation. However, participation did result in positive outcomes, including increased social participation, an improved sense of wellbeing and, for some participants, employment that may not have occurred if they had not participated.

Factors that affect participation and movement into employment

The TIA was designed to help the target groups overcome barriers to entering training such as the additional costs of transport and childcare. However, this evaluation suggests that these barriers may not always be sufficiently addressed by the TIA payment alone and that other issues may impact on participation and movement into employment. This finding is consistent with the literature, which suggests that both DPB and IB clients are likely to experience multiple barriers to employment. The evaluation clearly suggests there are a number of factors that particularly impact on the likely success of the TIA in assisting clients to undertake training, complete training and move into employment.

Participants' circumstances

Childcare can continue to be problematic with respect to successfully completing training and moving into employment. While in training, clients can receive assistance with childcare from both the TIA and the CCS, but once in employment, there is less financial support available and this may make it difficult for them to remain in employment.

Both IB and DPB recipients stated that health problems had affected their ability to complete their training and their ability to move into employment: for IB participants, their own health was most likely to impact on their likelihood of completing training and moving into employment; for DPB participants, the health of their children or other family members had an impact on their ability to complete training or remain in employment, eg an individual's child can become sick, requiring the parent to care for them. This may affect the individual's ability to remain in training

or, if they are in employment, this may result in the parent feeling pulled between their responsibility as a parent and as an employee. However, it seems from the interviews that TIA recipients feel sufficient support enables them to overcome difficult family circumstances and go on to complete study.

Course type

The type of training undertaken can have a major effect on an individual's ability to move into employment. This may be because the types of jobs that result from the training are not readily available or in demand, or individuals may not be able to find employment that fits with their continuing childcare responsibilities or with their impairment.

The level or content of the training course undertaken by clients was also found to have an impact on the ability of participants to successfully complete training. For some individuals, it had been some time since they last participated in formal training and they were either unprepared for the level of difficulty or found it difficult to balance study with their other responsibilities. The level of support received from providers and case managers was also found to have an effect on a client's ability to complete training.

Case managers felt that these issues could often have been addressed if there was a stronger emphasis on career planning before an individual was granted the TIA. Case managers felt that this planning process should encourage clients to consider labour market factors, and their abilities, level of readiness and circumstances, when considering what type of training to do.

Other labour market factors

Irrespective of gaining a qualification, clients may continue to find it difficult to move into employment if they do not have practical experience in the area of employment that they wish to move into. Case managers felt that this was less of a problem where clients had participated in a course that contained a practical component or where clients undertook voluntary employment in the same or a similar type of job while training.

This finding suggests there is a need to provide ongoing support to TIA recipients once they have completed their training to ensure that they receive any additional assistance required to move into employment. For example, if a client is unable to move into employment because they lack practical experience, this barrier could be addressed by utilising existing forms of employment assistance such as a wage subsidy or work experience programme. It is possible that other barriers could also be addressed by referring clients to other forms of assistance.

Summary

The TIA is targeted to the DPB and IB groups in recognition of the significant barriers to moving into employment that they face. It is based on the assumption that training will increase their likelihood of gaining employment. The "Summary of literature" section supports this assumption.

The present findings suggest that, overall, TIA-assisted training increases the likelihood of moving into employment for DPB recipients but not for IB recipients. The TIA is designed to address one barrier to employment – low skill level – in the longer term and a number of other barriers relating to the cost of childcare and travel in the short term. However, the findings also suggest that many of those who utilise the TIA experience multiple barriers and that while training may increase the likelihood of gaining employment, other barriers may prevent clients from capitalising on the benefits of their training. These barriers may affect participants before, during or after participation. To gain maximum benefit from TIA-assisted training, participants may require a package of assistance to overcome the full range of factors or barriers that affect their ability to move into employment.

Before a client participates in the TIA, it is important to provide adequate support to ensure that they have access to relevant information and that they are making well-informed choices with respect to course type. Clients need to be adequately supported while participating to ensure that any barriers that might prevent the participant from completing training can be addressed. In addition, it is important to ensure that once participants have completed training, they receive any additional assistance that they might require to move into employment.

TIA-assisted study and IB recipients

This evaluation found that the TIA was not effective in assisting the IB participant group as a whole to move into employment, but that it did assist some IB clients into employment. This suggests that in comparison with the DPB group, IB recipients are more disadvantaged in the labour market and may require additional support to move into employment. However, IB clients did benefit from participating in TIA-assisted training in that they achieved positive outcomes like increased interaction with others, an increased sense of wellbeing and increased self-confidence. Case managers felt that, for this group, TIA participation was often more about the participation itself.

For some clients, the TIA was seen as the first step towards employment, and clients may need to participate in life skill or personal development courses[3] before they are ready to participate in other forms of employment-related training. This suggests that it may take longer for some IB clients to achieve an employment outcome. If this is true, then it is possible that the time frame over which outcomes were measured in this study was not long enough to measure the full impact of the TIA for IB clients.

By definition, an individual who is receiving the IB must have demonstrated a long-term reduction in their ability to undertake more than 15 hours of paid employment per week. This requirement may function as a disincentive to moving into employment. Thus, given the emphasis of the TIA on employment outcomes, it might be argued that there is a mismatch between the objectives of the TIA programme and the full range of needs of the IB group. Currently, the TIA is not designed to result in social participation outcomes or to provide access to courses that might not be employment related per se, although they might be a first step towards participating in employment-related training. However, there is now an increasing emphasis on assisting people with disabilities to participate in a range of education, training and employment options, through packages of assistance adapted to each individual's capacity and needs (OECD, 2003).

The present study was not able to determine why the TIA is ineffective in assisting IB recipients to move into employment. It is not clear whether this lack of impact is because of the intervention itself or other factors. For example, the ability of individuals to move into employment after participating in the TIA may also have been affected by external factors like employer attitude or operational practice. As such, it is suggested that further work is required to determine why the TIA is ineffective in assisting IB recipients to move into employment. It is also suggested that there may be a need either to better tailor the TIA programme for the IB group or to examine alternative or additional mechanisms to assist people with disabilities to move into employment. MSD is undertaking work to examine policy and operational issues relating to the invalid and sickness benefits. This work will provide further information about issues faced by the IB group.

[3] Only some life skill or personal development courses are approved for TIA participation and they must contain a certain level of job search focus.

Outcomes by course and provider type

Case managers felt that course type was likely to have an effect on participants' outcomes. However, statistical analysis found that participants' outcomes did not vary depending on course or provider type. This finding could be in part because of the way in which this information is recorded in MSD's administrative databases. Currently, there are no formal guidelines about how courses should be classified into the existing TIA categories (academic, job skills and personal development), it being at the case manager's discretion. This may result in inconsistencies in the ways in which different case managers categorise the same course types. In addition, these categories provide limited information about the specific types of courses TIA recipients are undertaking. Given this, it is difficult to determine whether different course types result in different outcomes and it is likely that any analysis by the current course types is of limited value.

What may be of value is to improve the way in which courses are categorised and ensure that they are classified into these categories consistently. This would improve the accuracy of future monitoring information. In addition, it is recommended that TIA course information is categorised in a manner consistent with the way in which course information is categorised for other student groups. This would potentially allow some comparisons to be drawn between these populations.

Impact by characteristic

The findings of the impact analysis also suggested that, for DPB-type recipients, there was some variance in impact for both full and part-time employment outcomes depending on participants' characteristics. There were relatively consistent differences in impact depending on the age of participants, the age of their youngest child, their level of education, their ethnicity and, in some cases, the region in which they participated.

With respect to educational qualifications, the findings suggest that individuals gain most from participating in the TIA if they have a reasonable, but not high, level of education. This may be because such individuals were already reasonably well educated and could therefore easily move into higher education. This suggestion is supported by the finding here that one reason participants fail to complete training is because they found their course too difficult or were unprepared for the level of difficulty given their other responsibilities. In addition, some case managers thought that, for some clients (particularly those who had not been in formal training for some time), literacy or numeracy deficits could be problematic and that bridging courses were often a good starting point. This finding may also indicate that, for individuals with an already high level of education, any further gains are marginal and that these individuals would have been able to get a job without TIA-assisted training.

It is likely that the regional differences in impact that were found for the 1998 participants are the result of labour market factors. For example, it is possible that either these regions had good labour markets at the time at which individuals were completing training and moving into employment or the types of training TIA recipients undertake was in greater demand in these regions.

With respect to the age of an individual's youngest child, it should be noted that this was determined as at an individual's programme start date in either 1997 or 1998. It is possible that individuals who enter training when their child is in this age bracket (6 to 13 years) are either better able to undertake and complete study because their child is in school most of the day or because, when they finished training, their child was older and childcare was less of an issue. It is also possible that the difference measured here is due to the effects of the 1999 DPB reforms and that individuals who had undertaken TIA-assisted training may have been more

easily able to move into employment than individuals with children of a similar age but with lesser qualifications.

Locking in effects of programme participation

Programme participation can be defined in terms of two main phases: the participation phase and the post-participation phase. When establishing the impact of a programme, it is necessary to consider that, in the short term, participating in the programme will decrease the likelihood of an individual achieving an outcome. This is termed the "locking in" effect and refers to the decrease in participants' outcomes, like employment, that occurs while they are engaged in activities related to the programme rather than job seeking.

During this phase, individuals not participating in the programme are likely to continue job seeking and to achieve employment outcomes. Therefore, during the participation period, the employment outcomes of the participant group are likely to be lower than that of a non-participant group. If a programme is successful, it is assumed that the outcomes of the participant group will exceed those of non-participants in the post-participation phase, because of the effect of participating in the programme.

The current analysis measured impact over both the participation and the post-participation phases of the TIA. This was done as it is difficult to accurately determine the total length of an individual's participation phase from MSD's administrative data. In addition, it is difficult to estimate the typical length of TIA participation as length is likely to vary widely depending on the course being undertaken and whether an individual undertakes full or part-time study. This means that the impact represented here is inclusive of the programme's locking in effect. When the impact of a programme is measured in this way, the outcomes they achieve during the post-participation phase must exceed those achieved by the non-participants in both the participation and the post-participation phases for there to be a net gain in participants' outcomes. The findings of the present study indicate that, for DPB-type participants, their post-participation outcomes outweigh any locking in effects of the TIA.

As mentioned above, it is not possible to measure the exact length of an individual's TIA participation and it is not possible to be certain that all participants had completed their course of study. If this is true, then the total impact of the TIA for 1997 or 1998 participants may not have been captured here for either the DPB or the IB participant groups. Given this, it may be necessary to allow a longer time frame over which to measure participants' outcomes. For example, outcomes could be measured over a 10-year period rather than over a 5- or 6-year period.

Substitution effects

The term "substitution effect" refers to the likelihood that other job seekers may have moved into jobs that were instead filled by individuals who participated in the programme. Consequently, those other job seekers may experience a longer spell of unemployment. If this happens, then the programme results in one group of unemployed (participants) substituting for other job seekers (Salter, 2003). This is problematic when the individuals who may have gotten the jobs if they had not been filled by programme participants are equally as disadvantaged as those assisted by the programme.

The assumption made here is that an individual who participates in the TIA was disadvantaged with respect to moving into the employment and that participation in the TIA is likely to result in an increased skill base. In addition, it is assumed that this increased skill base will result in participants competing for jobs with less disadvantaged job seekers who are more easily able to return to employment than TIA participants prior to training. Based on these assumptions, the result would be a net gain in employment.

Conclusions and recommendations

The objective of the TIA is to improve participants' work skills, increasing their prospects of obtaining full or part-time employment and thus independence from the benefit. The findings of this evaluation indicate that the TIA is effective in meeting these objectives for DPB participants but not for IB participants.

In addition, the evaluation found that individuals who participated in TIA-assisted training achieved a number of positive outcomes other than employment, irrespective of benefit type or movement into employment. These positive outcomes included improved self-esteem and/or self-confidence, increased interaction with others and an increased sense of wellbeing. However, these types of outcomes are not currently recognised in the stated objectives of the TIA.

Given the evidence that the TIA is not effective in assisting IB recipients to move into employment, it is suggested that there is a need to carry out further work to determine why this is so and to examine alternative mechanisms to assist people with disabilities to move into employment. Alternatively, given that the evaluation suggests that people with disabilities who participate in the TIA achieve other positive outcomes, it is suggested that the objectives of the TIA could be broadened to reflect an increased range of outcomes.

The TIA is a valuable form of assistance that facilitates participation in training, but it is clear that DPB and IB clients experience multiple barriers to employment and the TIA alone is not always sufficient for clients to overcome these barriers and move into employment. This suggests that there is a need to ensure that TIA participants are provided with support and assistance throughout the participation process (before, during and after) to ensure that they receive the support required to help them to complete training and move into employment.

The present evaluation was limited in its ability to report on the effect of course type on the outcomes of participants. It is suggested that there would be value in improving the way in which course information is recorded for TIA participants; this would result in improved monitoring information.

The evaluation also identified a number of issues and concerns with respect to operational and delivery aspects of the TIA. Much of this information is not detailed in this report as the appropriate people within MSD have been informed and these issues are addressed in the *Training Incentive Allowance (TIA) – Review update* document.

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Appendix

Within group analysis

Table 4: ***Within group differences in time spent independent of Work and Income assistance for DPB participants***

		1997		1998	
		Estimate	Standard Error	Estimate	Standard Error
Age	15 to 17 yrs	0.012	0.013	–0.020	0.032
	18 to 19 yrs	0.004	0.042	0.007	0.019
	20 to 24 yrs	–0.034	0.011	0.021	0.215
	25 to 29 yrs	0.007	0.140	0.034	0.045
	30 to 39 yrs	0.014	0.054	0.009	0.032
	40 to 49 yrs	0.003	0.112	–0.002	0.077
	50 to 54 yrs	0.008	0.035	–0.014	0.016
	55 to 59 yrs	–0.023	0.007	0.032	0.011
	+60 yrs	0.004	0.004	0.006	0.036
Gender	Female	–0.007	0.004	0.027	0.067
	Male	0.009	0.005	0.010	0.014
Ethnicity	European	0.069	0.006	0.032	0.087
	Māori	0.002	0.004	0.006	0.002
	Pacific peoples	–0.004	0.013	0.005	0.024
	Other	0.001	0.004	0.018	0.020
Age of youngest child	0 to 5 yrs	–0.013	0.023	0.009	0.014
	6 to 13 yrs	0.002	0.008	0.024	0.003
	14+ yrs	0.015	0.102	0.004	0.204
	No child	0.007	0.004	0.020	0.220
Qualifications	None	0.054	0.128	0.032	0.030
	Post school	0.004	0.006	0.007	0.008
	School Certificate	–0.011	0.058	0.004	0.065
	Secondary above SC	–0.040	0.013	–0.054	0.041
Region	Northland	0.024	0.007	0.062	0.020
	Auckland North	0.005	0.014	0.001	0.005
	Auckland Central	–0.030	0.057	–0.008	0.112
	Auckland South	0.007	0.157	0.002	0.048
	Waikato	0.002	0.041	0.003	0.022
	Bay of Plenty	0.033	0.021	–0.021	0.061
	Taranaki	0.004	0.020	–0.009	0.007
	East Coast	–0.054	0.058	0.034	0.051
	Central	–0.012	0.032	0.028	0.037
	Wellington	0.002	0.080	0.009	0.087
	Nelson	–0.015	0.051	0.040	0.007
	Canterbury	–0.001	0.002	0.005	0.003
	Southern	0.009	0.004	0.007	0.015
Provider	Correspondence	0.042	0.009	0.053	0.033
	Polytechnic	0.032	0.012	0.004	0.070
	Private Training Estab.	–0.041	0.054	–0.006	0.032
	Secondary School	0.008	0.153	0.027	0.044
	TOPs/NZES	0.022	0.042	0.003	0.020
	Teachers College	0.003	0.023	0.012	0.016
	University	0.009	0.021	0.005	0.034
Course Type	Academic	0.003	0.012	–0.017	0.051
	Job Skills	0.014	0.033	0.009	0.078
	Personal Development	–0.032	0.071	0.010	0.037