

Overview of Resource Bank Used for Developing Process Study Interview Guides

This document includes a resource bank of topic areas and questions that will be used to create semi-structured interview guides for the BOND process study. The content covered in this document will serve three purposes across the seven rounds of site visits: (1) capture, in detail, the structure and process of the demonstration implementation; (2) assess the fidelity of the demonstration at multiple points in time; and (3) gather information about the experiences of those implementing and participating in the demonstration.

At the beginning of each round of visits, the task leader will create the key respondent interview guides from this bank of topic areas and questions that are relevant to that site visit round and key respondent. For each round of site visits, we develop an interview guide that is tailored to each respondent (between 6-8 interview guides total per round). For example, from the topic areas in this document, we will create an interview guide for the site director and staff, SSA regional and field staff, EWICs, and government agencies, among others. All site visitors will use the same interview guides developed for that site visit round.

Drawing from a bank of study topics and questions will allow us to capture the detailed nuances of the implementation while recognizing the dynamic nature of the demonstration. Table F1. shows the main study topics that will be covered during each round of site visits. Some of the visits will gather the original information while subsequent visits may gather updates for that topic area. Table F2. identifies which key respondent may be used to gather information on the different topic areas.

Below we briefly describe the main study topic areas included in this document. Each of these main topics are broken down into subtopics and questions (see Table F2).

- ***Site Background.*** Documents the demographic and economic environment prior to and after the demonstration is implemented.
- ***Current Services Available to SSDI Beneficiaries.*** Documents the availability and accessibility of work incentives planning services, employment and training resources, and other initiatives for individuals with disabilities prior to and after the demonstration is implemented.
- ***Agencies Involved with Demonstration Planning and Initial Implementation.*** Documents the types of agencies involved in the BOND demonstration planning and initial implementation and the level and nature of their involvement.
- ***Demonstration Site Recruitment, Planning, and Startup.*** Used to describe how each of the sites defined operational policies and procedures, identified and selected WIC and EWIC providers, and rolled out demonstration activities.
- ***Sample Selection, Recruitment, and Enrollment.*** Describes the process for implementing Stage 1 and Stage 2 recruitment, demonstration enrollment, and intake and baseline survey activities.

- ***Development and Structure of the Demonstration.*** Used to capture a detailed description of the EWIC and WIC providers including organizational background, administrative and staffing structure, types and amount of services provided, and service capacity before and after demonstration implementation.
- ***Demonstration Service Delivery.*** Provides a detailed description of the service delivery process for Stage 2 treatment group participants assigned to WIC and EWIC service. Topics addressed include outreach and recruitment, assessment, income and work incentives counseling, job readiness activities, case management, job placement, and retention. Information will be used to compare the level and types of services available to the WIC and EWIC treatment groups.
- ***Participation Patterns and Experience.*** Documents Stage 2 WIC and EWIC treatment groups' understanding of and experience with the BOND program features and services.
- ***Communication, Coordination, and Interagency Relationships.*** Aims at capturing information about the formal contracts and agreements in place to operate the demonstration as well as the formal and informal communication and coordination between and among agencies.
- ***Monitoring and Tracking.*** Documents the systems and processes for monitoring and tracking the demonstration site offices and Stage 1 and Stage 2 BOND participants.
- ***Assessment of the Demonstration Implementation.*** Used to describe and assess the quality and fidelity of the demonstration implementation.
- ***Successes, Challenges, and Lessons Learned.*** Used to collect information about the strengths and limitations of the BOND site as well as the key successes, challenges, and lessons learned in operating the demonstration.

Table F1. Research Topics by Round of Process Study Site Visit

	Round 1: Pre-Implementation	Round 2: Initial Implementation	Round 3: Demonstration Enrollment #1	Round 4: Demonstration Enrollment #2	Round 5: Post-Enrollment #1	Round 6: Post-Enrollment #2	Round 7: Post-Enrollment #3
Site Background	X	O	O		O	O	O
Current Services Available to SSDI Beneficiaries	X	O		O		O	
Agencies Involved with Demonstration Planning and Initial Implementation		X	O				
Demonstration Site Recruitment, Planning, and Startup		X	O				
Sample Selection, Recruitment, and Enrollment		X	O	O	O		
Development and Structure of Demonstration		X	O	O	O	O	O
Demonstration Service Delivery		X	O	O	O	O	O
Participation Patterns and Experience			X	O	O	O	O
Communication, Coordination, and Interagency Relationships		X	O	O	O	O	O
Monitoring and Tracking		X	O	O	O	O	O
Assessment of the Demonstration Implementation		X	O	O	O	O	O
Successes, Challenges, and Lessons Learned					X	O	O

Note: "X" indicates initial data collection; "O" indicates will update information

Table F2. Research Topics by Key Informant Interviews

	Site Director and Staff ^a	SSA Regional and Field Staff ^b	EWICs ^b	WIPAs/ CWICs ^b	Government Agencies ^c	Disability Advocates	BOND Participants (Focus Groups)
I. SITE BACKGROUND							
Description of geographic region/service area	X	X					
Demographic characteristics	X						
Characteristics of people with disabilities	X	X					X
Description of local labor market, in general and for people with disabilities	X	X	X	X	X	X	X
Barriers to employment for SSDI beneficiaries	X	X	X	X	X	X	X
II. CURRENT SERVICES AVAILABLE TO SSDI BENEFICIARIES							
Existing services available to SSDI beneficiaries through the Work Incentives Planning and Assistance (WIPA) providers	X	X		X	X	X	
Accessibility of WIPA services	X	X		X	X	X	
Other initiatives and services for SSDI beneficiaries	X	X		X	X	X	
Successes/Challenges of employment support initiatives	X	X		X	X	X	
III. AGENCIES INVOLVED WITH DEMONSTRATION PLANNING AND INITIAL IMPLEMENTATION							
Area Work Incentives Counselors (AWIC)	X	X					
SSA field office functions	X	X					
Work Incentive Liaisons (WILs)	X	X					
WIPAs	X			X			
State Vocational Rehabilitation Agency (SVRA) staff	X				X		

	Site Director and Staff ^a	SSA Regional and Field Staff ^b	EWICs ^b	WIPAs/ CWICs ^b	Government Agencies ^c	Disability Advocates	BOND Participants (Focus Groups)
Centers for Independent Living (CIL) staff	X				X		
One-Stop Career Centers (OSCC) and Disability Program Navigators (DPNs)	X				X		
Local disability advocates	X						
Other agencies	X		X				
IV. DEMONSTRATION SITE RECRUITMENT, PLANNING, AND STARTUP							
A. OVERVIEW OF PLANNING PROCESS							
Agencies/individuals involved with planning process	X	X	X	X	X	X	
Pre-implementation activities	X	X	X	X	X		
Designing operational policies and procedures	X	X	X	X	X		
Establishing challenges of communication and coordination across agencies	X	X	X	X	X		
Technical assistance activities	X		X	X			
B. ENHANCED WORK INCENTIVES COUNSELING (EWIC) PROVIDER PLANNING							
Identifying and recruiting EWIC providers	X		X				
Required staffing or organizational changes	X		X				
Planned roles and responsibilities	X		X				
C. REGULAR WORK INCENTIVES COUNSELING (WIC) PROVIDER PLANNING							
Identifying and recruiting WIC providers	X			X			
Required organization or staffing changes	X			X			
Planned roles and responsibilities	X			X			
D. ASSESSMENT OF PLANNING AND INITIAL IMPLEMENTATION PERIOD							
Experience with initial planning	X	X					

	Site Director and Staff ^a	SSA Regional and Field Staff ^b	EWICs ^b	WIPAs/ CWICs ^b	Government Agencies ^c	Disability Advocates	BOND Participants (Focus Groups)
Startup successes/challenges	X	X					
Lessons learned	X	X					
V. SAMPLE SELECTION, RECRUITMENT, INTAKE							
Demonstration outreach and intake (Stage 1)	X	X					
Concurrent beneficiaries (Stage 1)	X	X					
Demonstration outreach and recruitment (Stage 2)	X	X				X	
Intake and baseline survey (Stage 2)	X	X					
Recruitment success rate (Stage 2)	X	X					
VI. DEVELOPMENT AND STRUCTURE OF DEMONSTRATION							
Demonstration lead	X						
Date of demonstration implementation	X						
A. DESCRIPTION OF EWIC PROVIDER							
Description of EWIC provider	X		X				
Administrative and staffing structure	X		X				
Types and amount of services provided	X		X				
EWIC provider service capacity before and after demonstration implementation	X		X				
B. DESCRIPTION OF WIC PROVIDER							
Description of WIC provider	X			X			
Administrative and staffing structure	X			X			
Types and amount of services provided	X			X			
WIC provider service capacity before and after demonstration implementation	X			X			
VII. DEMONSTRATION SERVICE DELIVERY							
A. DESCRIPTION OF EWIC SERVICE DELIVERY							
Outreach and recruitment efforts			X				X

	Site Director and Staff ^a	SSA Regional and Field Staff ^b	EWICs ^b	WIPAs/ CWICs ^b	Government Agencies ^c	Disability Advocates	BOND Participants (Focus Groups)
Initial and ongoing assessments			X				X
Process for creating and revising the Work Incentive Plan (WIP)			X				X
Description of work incentives counseling			X				X
Linking demonstration participants to outside providers			X				X
In-house job readiness/job placement services			X				X
Availability and types of work supports			X				X
Job retention services			X				X
Process for monitoring earnings			X				X
Other activities			X				X
Use of EWIC services			X		X		X
B. DESCRIPTION OF WIC SERVICE DELIVERY							
Process for accessing services				X			X
Income and work incentives counseling				X			X
Information and referral to employment services				X			X
Process for monitoring earnings				X			X
Other activities				X			X
Comparison of WIC services pre- and post-demonstration				X			X
Use of WIC services				X	X		X
C. PROCESS FOR ADJUSTING BENEFITS							
Responsibility for adjusting SSDI benefits	X	X					
Process for adjusting benefits	X	X					
Successes/Challenges	X	X					

	Site Director and Staff ^a	SSA Regional and Field Staff ^b	EWICs ^b	WIPAs/CWICs ^b	Government Agencies ^c	Disability Advocates	BOND Participants (Focus Groups)
VIII. PARTICIPATION PATTERNS AND EXPERIENCE							
Understanding of \$1 for \$2 benefits structure			X	X			X
Understanding of WIC services				X			X
Understanding of EWIC services			X				X
Understanding of other program features			X	X			X
Treatment group members' opinions and assessment of BOND features			X	X			X
IX. COMMUNICATION, COORDINATION, AND INTERAGENCY RELATIONSHIPS							
Interagency relationships	X		X	X	X	X	
Contracts and formal agreements	X		X	X	X	X	
Communication and service coordination between agencies	X		X	X	X	X	
Perceptions of partner agencies about BOND	X		X	X	X	X	
X. MONITORING AND TRACKING							
Systems used for tracking treatment group's progress	X		X	X			
Monitoring and tracking process	X		X	X			
Consistency and quality of monitoring and tracking	X		X	X			
XI. ASSESSMENT OF THE DEMONSTRATION IMPLEMENTATION							
Preventing contamination or crossovers/integrity of random assignment	X		X	X			
Differences in the quality, quantity, and mix of services offered to treatment and control groups	X	X	X	X			
Comparison of enhanced and regular work incentives counseling	X	X	X	X			

	Site Director and Staff ^a	SSA Regional and Field Staff ^b	EWICs ^b	WIPAs/ CWICs ^b	Government Agencies ^c	Disability Advocates	BOND Participants (Focus Groups)
Fidelity of implementation	X	X	X	X			
Extent to which expectations matched actual outcomes	X	X	X	X			
Experience with BOND implementation	X	X	X	X	X	X	
Implementation strengths/challenges	X	X	X	X	X	X	
Lessons learned with the implementation of BOND	X	X	X	X	X	X	
XII. SUCCESSES, CHALLENGES, AND LESSONS LEARNED							
Site strengths/limitations	X	X	X	X	X	X	X
Advantages of benefit offset	X	X	X	X	X	X	X
Strengths/Challenges of EWIC services	X	X	X	X	X	X	X
Unexpected consequences of the demonstration	X	X	X	X	X	X	
Promising practices	X	X	X	X	X	X	

^a Each demonstration site includes the follow: Site director, outreach and recruitment specialist, BOND specialist, and mobile BOND specialist.

^b SSA (Social Security Administration); EWICs (Enhanced Work Incentives Counseling); WIPAs (Work Incentives Planning and Assistance); CWICs (Community Work Incentive Coordinators)

^cGovernment agencies may include State Vocational Rehabilitation Agencies, Centers for Independent Living, and One-Stop Career Centers.