

myRA VITA Sites - Leaders Interview Protocol

CONFIDENTIAL INTERVIEW COVER SHEET

Organization's name:

Interviewee's name:

Date:

It's great to meet you and thank you for agreeing to be part of this study. I'm a Research Scholar at Washington University in St. Louis' Center for Social Development.

As you know, we're trying to learn about what works at VITA sites that promote the myRA program. We really appreciate you taking the time to give us your perspective so that we can help other VITA sites improve how they're doing things and help more clients who could benefit from myRA get signed up.

Our conversation should take about an hour. I want to remind you that your participation in the study is completely voluntary and that you're free to skip any questions you'd prefer not to answer or to discontinue the interview at any time. However, if you don't complete the interview your agency won't receive the incentive. Your responses will be kept confidential and your name will never be used outside of our research team.

Do you have any questions before we get started?

1) [ICEBREAKER] Can you tell me a little about your role here at [organization name]?

2) How would you describe the "culture" of this organization? What does it feel like to work here? How do people perceive the organization's priorities?

3) Another thing we're trying to understand is how the cultures of the VITA sites operate with respect to the concept of savings in a general way. How do you think that plays out at [organization name]?

4) With regard to your tax filing clients, what kind of contact information are you currently collecting? Do you use that information to stay in touch with clients before and after tax season?

[] PROMPT FOR ANY PLANS TO CHANGE APPROACH IN THE FUTURE

5) Great, thanks. Let's talk a little about myRA. Can you tell me how you learned about it?

[] PROMPT FOR LEVEL OF UNDERSTANDING/COMFORT EXPLAINING?

6) How familiar are your staff and volunteers with myRA?

7) Have you been involved in conducting any training for volunteers, especially with respect to myRA? Or does someone else on your staff handle that?

[] PROMPT FOR HOW VOLUNTEERS ARE TRAINED TO TALK ABOUT SAVINGS AND SPECIFICALLY ABOUT myRA (WHAT IS INVOLVED IN THE TRAINING?)

[] PROMPT FOR WHEN BEGAN PROMOTING myRA AND RELATIONSHIP TO CHANGE IN 8888 FORM...WILL PROMOTE NEXT YEAR TOO?

[] PROMPT FOR WHETHER VOLUNTEERS PROMOTE SAVINGS IN GENERAL AND IS IT UNIVERSAL OR ONLY SOME

[] PROMPT FOR PERCENT OF VOLUNTEERS WHO PUT IN A LOT OF TIME VS. ONLY A LITTLE TIME

8) [RAPPORT TEST] And what do you think of the myRA program? Remember, our conversation is confidential and your answers won't be shared with anyone outside of our research team.

[] PROMPT FOR LIKES AND DISLIKES

9) Overall, does it seem to be pretty easy or kind of hard for your volunteers to get clients to sign up for the program? Why do you think that is?

[] PROMPT FOR WHETHER OR NOT THEY FEEL THEY HAVE ADEQUATE INFORMATION ABOUT THE PROGRAM

[] PROMPT FOR WHETHER THEY RECOMMEND SETTING UP myRA AT OTHER TIMES OF YEAR (E.G., WHEN HELPING CLIENTS SET UP BUDGETS)

10) And what do you think best persuades clients to sign up for myRA?

11) Do you see any patterns in which of your clients seem to sign up for myRA and which ones don't?

[] PROMPT FOR CLIENT CHARACTERISTICS (AGE, FAMILY CONFIGURATION, TAX FILING OUTCOME)

[] PROMPT FOR MOST COMMON OBJECTIONS

[] PROMPT FOR # AND % OF CLIENTS WHO ARE:
INTERESTED IN myRA
OPENED A myRA ACCOUNT

FUNDED myRA USING TAX REFUND
SAVED SOME OF REFUND ANOTHER WAY

12) And what about with your volunteers? Have you noticed any patterns in which volunteers seem to have the most or least success in getting clients to sign up for myRA?

13) Ok. Are there particular channels for sharing information that would really work in [organization name]? Things like pamphlets, PowerPoint trainings, webinars, or other stuff like that?

14) Great. And have you seen any side benefits for your agency in promoting myRA?

15) And what do you think would make the most difference in improving myRA results at [organization name]?

16) We'd really appreciate your thoughts about what might help persuade other VITA sites to increase their promotion of the myRA program. Do you have any suggestions for us?

Thanks so much, that was really helpful. Those are all the questions I have for you today. Are there other things you'd like to add or any questions you wanted to ask me?

Thank you again for participating in the study, we're so grateful for your insights!

END OF INTERVIEW