**INSTRUMENT 2**

**GUIDE FOR PREVISIT CALLS**

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## GUIDE FOR PREVISIT CALLS WITH AJC AND LWIB CONTACTS

- *Italics* indicate instructions for the study team.

### Introduction

Thank you for agreeing to participate in the Institutional Analysis of American Job Centers AJCs, a study that we are conducting for the U.S. Department of Labor, Chief Evaluation Office.

As you know, members of the study team will visit <the selected AJC> and <its local workforce investment board (LWIB)> to gain an in-depth understanding of how this AJC is structured, managed, staffed, and funded, as well as the full range of services offered to meet the varying needs of different customer populations.

To help us prepare for our visit, I wanted to talk with you <AJC manager/LWIB manager> to collect basic information about the <AJC/LWIB>. What we learn during our discussion now will ensure that we have a productive site visit. We want to make sure:

1. We schedule site visit interviews with the organizations and staff who can best inform our study.
2. We conduct those interviews efficiently.

At the end of our discussion, I will want to identify some possible dates for our site visit. We expect that the visit will take three days, and would like to schedule it for some time in the next <two months>.

### Confirming basic information

We have been collecting initial information about the AJC and LWIB from your website and other publicly available sources.

As a first step, I wanted to confirm the basic information that we have:

- *Review with respondent the information that you have already collected about the site.*
- *Update your notes as necessary.*

### Collecting other information

We also want to ask you about other basic aspects of the AJC's/LWIB organization.

- *Ask about topics for which you need to know in order to identify respondents and plan your visit.*

### Partner information

An important goal of this study is to understand the relationships among the various organizations that are partners of the AJC.

<*In selected AJCs add:* In addition to talking with partner staff during our site visit, we also plan to administer a three-question survey to the partners shortly after we complete the site visit.>

Which organizations do you consider to be partners of <the AJC>?

- *Ask this question of the AJC and LWIB respondent; note on the form any disparities between the answers from the two types of respondents.*

- *Record partner information; for each partner identified by the respondent, ask about the type of agreement or arrangement, colocation, hours, services, and the partner's contact information.*

## Request documents and forms to inform site visit and study

We are also interested in learning about the AJC's financial structure and the sources and types of service information collected across programs. The information could be collected for different reasons, including requirement of funder, use for performance management, and so on.

We would like to collect documents that will help inform us about these issues. These documents include the following:

- Documents that outline the AJC's funding and resource-sharing structure, such as:
  - AJC memorandums of understanding (MOUs)
  - Resource-sharing agreements (RSAs)
  - AJC operating budgets
  - Other *existing* financial documents that contain this information
- Performance management reports, such as:
  - Data outputs and/or reports that present aggregate figures on such things as (a) customer characteristics, (b) total customers served, (c) percentage of customers receiving select services, and (d) performance outcomes
  - Complementary materials, such as (a) data system procedures and training manuals; (b) data dictionaries; (c) data system guidelines and procedures; (d) data-mapping documents; and (e) data, management, and performance reports

We'd appreciate it if you could share whatever *existing* documents that you have that could provide the necessary information.

In addition, we'd like to know who would be the best person or people—at the AJC, the LWIB, or both—to follow up with regarding these topics. We might want to speak with them before our site visit, and will want to make sure we meet with them during the visit.

## Identify possible dates for the visit

I anticipate that we will want to spend about <2.5> days meeting with staff of the AJC and various partners, and a half day meeting with staff of the LWIB. Interviews will typically last 45 minutes to an hour, with no single interview exceeding two hours. And we hope to conduct this visit within the next <two> months.

Based on our schedule, we'd like to suggest these possible weeks:

- *Suggest possible weeks for visit.*

Do you think that any of these dates would work?

## Next steps

Based on the information you've provided, we will develop a list of the people we'd like to meet with during our site visit. We will share that list with you.

Following this meeting, I'd like to email you a summary of what we discussed and the next steps, including the documents and other information we'd like to collect.

It would be great if we could set a time on the calendar now for a follow-up discussion about any materials, possible site visit dates, and schedule.

When would be a good time for you?

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