

Appendix A: Text Ed Study EOC Staff Interview Protocol

Thank you for participating in the Text Ed Study. The Text Ed Study is a research project that will test an innovative text messaging system called *Text Ed* designed to help Education Opportunity Center (EOC) clients apply for financial aid and enroll in college. The Institute of Education Sciences (IES) at the U.S. Department of Education (ED) has contracted with MDRC, a nonprofit, nonpartisan research organization, and Dr. Lindsay Page from the University of Pittsburgh to conduct this study at select Educational Opportunity Centers (EOCs) nationwide.

We expect today's conversation to take about 75 minutes. The goal of our conversation is to gather more information about your EOC, how you serve clients in general, and to obtain more detailed information about how you support individuals through the college-going and financial aid process. We will use this information to understand your center's business as usual practices and customize the Text Ed intervention as best as we can to the needs and contexts of your program site.

Participation in this conversation is voluntary. We would like to audio record our conversation to make sure we capture your responses accurately, and so we can focus on the conversation with you. The recording and any notes associated with it will not be shared with anyone outside of the research team. We will not use your name, the name of your EOC, or the names of EOC staff in published reports. In addition, all recordings will be stored securely. No one other than the Text Ed team will have access to these materials.

Do you have any questions for me before we begin?

SITE BACKGROUND

1. I'd like to confirm a few pieces of background information about your site. (*Interviewer:* Pre-populate as much of the information in this section as possible prior to the interview. If the information is not yet known, ask as a question. Note that some information may not be available or will be more uncertain for new grantees.)

(a) Your site is a:

- New site (grant awarded in 2016 and going into second year of operation);

OR

- Existing site that has been operational for [X] years

(b) # of clients served each year: _____

(c) Number of offices, satellite locations, description of catchment area, # of staff:

	Description of catchment area (e.g. which counties are served)	# of FT staff and role	# of PT staff and role
Main office name:			
Name of satellite location #1:			
Name of satellite location #2:			
Name of satellite location #3:			

2. We would like to confirm the primary point(s) of contact for this project. Primary contact(s): _____

3. Who will be the key staff supporting EOC clients using the *Text Ed* system at each location?

Key staff at main office:	
Key staff at satellite location #1	
Key staff at satellite location #2	
Key staff at satellite location #3	

UNDERSTANDING BUSINESS AS USUAL PROGRAMMING

In this next part of our interview, I'm going to be asking you a series of questions about the kinds of EOC clients that are eligible for this project-- particularly, those who are age 18 and over and have their high school diploma or equivalent at the time of intake and are not enrolled in a postsecondary institution.

4. Over the course of a year, for approximately what percentage of clients is their first interaction with the EOC:

	<i>Interviewer:</i> Ask EOC staff to provide a percentage. Estimates should add up to 100 percent.
At a large group workshop or presentation. The client does not receive individual support at that time.	_____ %
At a large group workshop or presentation. The client receives individual support after the workshop or presentation.	_____ %
At a scheduled or walk-in appointment (in-person or phone) with an EOC staff member.	_____ %
Other: _____	_____ %
	100%

- (a) For those clients whose first interaction is at a large group workshop or presentation without time for individual support, what activities typically happen? (Check all that apply)

- Provide overview of EOC programs, supports, and services
- Fill out intake form
- Go over the financial aid process and provide directions for how to complete the FAFSA
- Fill out the FAFSA as a group

- Go over the college application process and distribute resources related to enrolling in college (for example, links to the online college application, distributing hard copies of the applications, distributing resource guides with contact information of college enrollment advisors, etc.)
- Schedule a follow-up meeting for individual support
- Provide a list of other programs or resources in the community
- Other: _____

(b) For those clients whose first interaction is at a large group workshop or presentation *with time for individual support*, what activities typically happen? (Check all that apply)

- Provide overview of EOC programs, supports, and services
- Fill out intake form
- Conduct a needs assessment and fill out an individualized plan for meeting stated goals
- Go over the financial aid process and provide directions for how to complete the FAFSA
- Begin the financial aid application process
- Complete and file the FAFSA
- Go over the college application process and distribute resources related to enrolling in college (for example, links to the online college application, distributing hard copies of the applications, distributing resource guides with contact information of college enrollment advisors, etc.)
- Complete and submit the college application(s)
- Refer to other programs or resources in the community
- Other: _____

(c) For those clients whose first interaction is a scheduled or walk-in appointment with an EOC staff member, what activities typically happen? (Check all that apply)

- Provide overview of EOC programs, supports, and services
- Fill out intake form

- Conduct a needs assessment and fill out an individualized plan for meeting stated goals
- Go over the financial aid process and provide directions for how to complete the FAFSA
- Begin the financial aid application process
- Complete and file the FAFSA
- Go over the college application process and distribute resources related to enrolling in college (for example, links to the online college application, distributing hard copies of the applications, distributing resource guides with contact information of college enrollment advisors, etc.)
- Complete and submit the college application(s)
- Refer to other programs or resources in the community
- Other: _____

(d) (If applicable) For those clients who have other types of initial interactions, what activities typically happen? (Check all that apply)

- Provide overview of EOC programs, supports, and services
- Fill out intake form
- Conduct a needs assessment and fill out an individualized plan for meeting stated goals
- Go over the financial aid process and provide directions for how to complete the FAFSA
- Begin the financial aid application process
- Complete and file the FAFSA
- Go over the college application process and distribute resources related to enrolling in college (for example, links to the online college application, distributing hard copies of the applications, distributing resource guides with contact information of college enrollment advisors, etc.)
- Complete and submit the college application(s)
- Refer to other programs or resources in the community
- Other: _____

5. For the population of clients that are eligible for this project, what does the follow-up typically look like after the first meeting? (Choose ONE)
- o We do not proactively follow up with anyone after the first meeting. We only communicate with individuals if they have a question, are requesting a referral or recommendation about resources available, or reach out to us about some other need.
 - About what percentage of clients reach out to you on their own after that first meeting? ___ %
 (Skip to question #7)
 - o We proactively follow up with selected clients.
 - About what percentage of clients fall into this category of “selected clients” that receive proactive follow-up? ___ %
 - *Follow-up open-ended question:* What types of clients, or under what circumstances, do you proactively follow-up with clients?
 - o We proactively follow-up with all clients.
6. (If applicable) How often would you say you utilize the following modes of communication to proactively follow-up with clients?

MODE OF COMMUNICATION	<i>Interviewer:</i> Ask EOC staff to choose one: (1) Never; (2) Every week; (3) Every two weeks; (4) Monthly; (5) At strategic times (note follow-up question below); (6) Other (please specify)
Email	
Text	
Phone call	
Paper letter	
Social media	
In-person	
Other: _____ (Please specify)	

(a) *Interviewer:* If staff member indicates that they “follow-up at strategic times,” for each mention, ask: What are the strategic times that you follow-up with clients? Close to their target enrollment date, around the time the FAFSA is due, or something else?

(b) When you try to call or text, approximately what percentage of your clients' cell phone numbers have changed or are inactive? ____ %

- How do you typically reach or follow-up those individuals, if at all?
- What is your process for updating their contact information, if there is one?

7. For the population of clients that are eligible for this project, roughly what percentage of individuals are actively engaged with your EOC over the following timeframes:

	<i>Interviewer:</i> Ask EOC staff to provide a percentage. Estimates should add up to 100 percent.
Initial meeting only	_____ %
1-3 months	_____ %
3-6 months	_____ %
6 months to a year	_____ %
Over a year	_____ %
	100%

8. For the population of clients that are eligible for this project, roughly what percentage of individuals plan on enrolling in college within the following timeframes?

	<i>Interviewer:</i> Ask EOC staff to provide a percentage. Estimates should add up to 100 percent.
Less than a month from the first interaction with your EOC	_____ %
Within 1-2 months of the first interaction with your EOC	_____ %
Within 3-6 months of the first interaction with your EOC	_____ %
Within 6 -12 months of the first interaction with your EOC	_____ %
More than a year after the first interaction with your EOC	_____ %
	100%

TAILORING THE MESSAGE CONTENT TO THE EOC SITE

The message content is organized into six modules (*Interviewer*: Share table below). I'd like to talk a bit about each and how we might tailor the messages to your site.

Module	Objective
Introduction	Establish relationship and provide an opt-out option
College search & application	Prompt clients to begin & complete search process
FAFSA / financial aid	Explain steps to completing FAFSA
College & financial aid acceptance	Prompt follow up to ensure they have been accepted to their program & received/accepted financial aid
College transition	Prompt completion of required pre-enrollment tasks
Life circumstances	Mitigate circumstances that may impact follow-through
General outreach	General check in; establish EOC as place of caring & support

Introduction

1. The text messages will be designed to come from a specific EOC staff member at your site. Are specific staff members assigned to individual clients at the time of intake? If so, how do you decide which staff member gets assigned to each individual? Will you follow the same process moving forward for the individuals participating in this project?
2. If individual staff members are not assigned at the time of intake and/or it does not make sense for the text messages to come from a specific staff person, we can make the text messages come from your EOC team. Is there a standard EOC team name you'd prefer the text messages come from? The info you provide is what will show up in the actual text messages.

College search and application

3. Could you provide us with a comprehensive list of postsecondary institutions that your EOC clients typically attend?

FAFSA / financial aid

4. Could you walk me through what your typical process is for supporting clients through the FAFSA process? What is your first step with a client? What comes next? (*Interviewer*: Probe about all the steps in between.) What is the last step in the FAFSA process when you're working with an individual?
 - *If applicable*: Are there variations to this process across satellite locations?
5. What are the biggest stumbling blocks that clients experience in getting through this process? How do you help individuals overcome those stumbling blocks?
 - If applicable: Are there variations to this process across satellite locations?

College and financial aid acceptance

- 6. How do you typically support or work with individuals who have already been accepted to college?
 - If applicable: Are there variations to this process across satellite locations?

College transition

- 7. What are the different ways you support or work with individuals through the college-going process? What topics do you usually discuss with individuals about the college transition process?
- 8. What are the main stumbling blocks they encounter as they transition to college? How do you help individuals overcome those stumbling blocks?

Life circumstances

- 9. What resources/supports do you and your staff provide related to each of the following topics: childcare, work/school balance, and transportation?

Life circumstance topics that the EOC provides support for	Resources offered by location		
	Main office/headquarters	Satellite location #1	Satellite location #2
Childcare			
Work/school balance			
Transportation			

- 10. As part of your general outreach or program activities, does your EOC typically host events for clients who have already gone through your intake process? If so, could you give us a list of events that you'd like to advertise via text to the Text Ed clients? (*Interviewer:* Staff can provide this after the call. Please make sure to follow-up.)
- 11. Would you need to be able to target these advertisements in any particular way? (For example: by intended college, by county, by life circumstance, college enrollment status, etc.)

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is XXXX-XXXX. The time required to complete this information collection is estimated to take an average of 75 minutes, including the time to review instructions, search existing data resources, gather the data needed, and complete and review the information collected. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the U.S. Department of Education, 400 Maryland Ave., SW, Washington, DC 20210-4537 or email ICDOcketMgr@ed.gov and reference the OMB Control Number XXXX-XXXX.

OMB NO.:

EXPIRATION DATE:

Notice of Confidentiality

Information collected for this study comes under the confidentiality and data protection requirements of the Institute of Education Sciences (The Education Sciences Reform Act of 2002, Title I, Part E, Section 183). Responses to this data collection will be used only for statistical purposes. The reports prepared for the study will summarize findings across the sample and will not associate responses with a specific Education Opportunity Center (EOC) grantee or individual. We will not provide information that identifies you or your EOC to anyone outside the study team, except as required by law.