

STATE TANF CASE STUDIES: OBSERVATION GUIDE

1. Observation: One-on-one meeting

Program name: _____ Location: _____

Observer name: _____ Date: _____ Observation of Entire/Partial meeting (circle one)

Observation time start: _____ Observation time finish: _____

Type of meeting		✓
Program intake		
Case management, coaching, or counseling session		
Other (specify):		
Observation details		
Who is present? An individual participant or participant with his or her partner/children? What type of staff member (for example, intake worker, case manager)?		
If known, was the appointment scheduled or was it a walk-in?		
For case management, was the meeting with the participant's regular case manager or another staff member (specify)?		
Describe what occurs during the meeting. What topics are discussed? Does the case manager raise all topics, or does the participant also raise topics?		
For intake: what questions do the worker and participant ask? What information is provided about the program? What happens next?		

<p>Are assessments given or discussed? Which ones? How are the results presented and used?</p>	
<p>Are specific tools or forms used during the meeting or activity? Which ones? How are they used?</p>	
<p>Does the participant appear to understand the tools or forms? Provide examples.</p>	
<p>What participant needs, barriers, and challenges are identified through the assessments, tools, and forms? Does the participant open up about his or her needs through general discussion?</p>	
<p>Are wraparound or supportive services discussed (for example, child care, transportation)? Which types? What is discussed: the participant's needs or challenges; eligibility, service funding amounts, or limits? What advice is given?</p>	
<p>Are referrals made to partners or community resources? Which programs? How much assistance is provided with the referral (for example, the participant receives a name and phone number, or the staff member sets up an appointment)?</p>	
<p>If the meeting involves selecting a training program, provider, or job placement, what guidance or advice does the staff member provide? To what degree is the participant's choice honored?</p>	

Are any agreements reached?	
What next steps were suggested to occur after the meeting, for the staff member and the participant?	
Are there any disagreements, misunderstandings, or lack of consensus between the staff member and the participant? Are they resolved? If so, how?	
Comment on the observed relationship between the participant and the staff member.	
How comfortable with each other do they seem? Does the participant appear to trust the staff member? Is the participant engaged in the discussion?	
Is the staff member courteous and respectful of the participant? Provide examples.	
Describe how the staff member communicates with the participant. What is his or her tone of voice? Does he or she ask open-ended questions? Does he or she make sure the participant understands everything discussed?	
Does the participant appear satisfied with the meeting? Does the participant seem to need or want additional assistance that is not being provided?	
Describe the physical setting for the meeting.	

Is the setting appropriate for the nature of the discussion? Provide examples.	
Is there sufficient privacy ? Are there distractions?	
Does the meeting space appear comfortable and inviting ? Or does it appear uninviting? Provide examples.	

2. Observation: Employment and training or group activity

Program name: _____ Location: _____

Observer name: _____ Date: _____ Observation of Entire/Partial activity (circle one)

Observation time start: _____ Observation time finish: _____

Type of activity		✓
Program orientation		
Occupational skills training class		
Academic class (e.g., GED or adult basic education course)		
Workshop (e.g., job search strategies, interviewing skills, workplace behavior)		
Peer group activity (e.g., support group for program participants)		
Work site		
Other (specify):		
Observation details		
Number of participants present		
Does the activity include participants from different programs or only those from the program being studied?		
Number of staff present; organizational affiliation(s) of staff present		
Describe what occurs during the activity.		
Who leads the activity?		
What is the content of the activity (that is, what topics are discussed)?		
What is the format of the activity (for example, classroom, hands-on		

instruction, discussion group, other)?	
What is the activity's overall length ?	
Do the participants seem engaged ? Do they indicate that they understand the content? Provide examples.	
Describe the physical setting for the activity.	
Does the setting seem appropriate for the content of the activity and the number of participants and staff? Provide examples.	
Does the setting appear comfortable and inviting ? Does it appear uninviting? Provide examples.	

3. Observation: Physical environment of program office

Program name: _____ Location: _____

Observer name: _____ Date: _____ Day of week/hours observed: _____

Front office/waiting room observation details	
Number of participants present (specify number of adults and children)	
Is the number of people present stable, or is there a constant flow? Describe.	
Number of staff present	
Does the front office/waiting room appear comfortable and inviting to participants? Or does it appear uninviting? Provide examples.	
How do participants access the waiting room or office space (for example, do they buzz or sign in)? Is there a receptionist or information desk? A sign-in sheet?	
Describe the layout of the front office/waiting room.	
What furniture is present? Is there enough room to seat all participants?	
What resources are available for participants to use, if any (for example, computers, printers, telephones)?	
Are there features of the space that support/enhance customer focus (for example,	

soothing paint colors, lobby with plenty of seating and space, natural light, clear signage)?	
Is there any space or activities for children ? Are children using the space?	
Describe signage and informational material on walls.	
Describe types of hard copy materials available. Are any available for wraparound/supportive services?	
Describe what participants are doing while waiting. How long is the wait time?	
Describe what staff are doing (if visible).	
Office space observation details	
Describe the layout of the office.	
Is it an open floor plan or separate offices/cubicles?	
Where do frontline staff sit (for example, in separate offices or cubicles, in shared offices)?	
Are there features of the space that support/enhance customer focus (for example, soothing paint colors, natural light)?	
How accessible is the office space? Are there areas/offices where participants' access is	

restricted? Is it easy to get around?	
Does the office space appear comfortable and inviting to participants? Or does it appear uninviting? Provide examples.	