

## **Instrument 3. Virtual Site Visit Interviews**

# Integrating Financial Capability and Employment Services Project

## A. Introductory Statement and Consent

Thank you for your interest in today's discussion. This interview is being conducted for the *Integrating Financial Capability and Employment Services* project sponsored by the Office of Planning, Research, and Evaluation in the Administration for Children and Families, an agency within the U.S. Department of Health and Human Services. MEF Associates is conducting the study for them, with Urban Institute as partners. MEF Associates and Urban Institute are social policy research organizations located in the Washington, DC area. This project seeks to better understand financial capability interventions delivered in the context of employment and training programs serving adults with lower or modest incomes. As part of the project, we are interviewing staff and managers of programs that deliver employment and training programs and financial capabilities interventions that are in some way coordinated or integrated.

The intervention questions will focus on details about your organization, the employment and training and/or financial capability services it offers, the ways the two types of services work together, partnerships and staffing involved in delivering these services, promising practices and challenges in delivering these services, and any relevant outcome measurements and evaluations. The interview will take about 90 minutes.

Your participation is voluntary. You do not have to answer any question you do not want to, and you may end the interview at any time. You are not required to meet with us or answer our questions, and you may stop participating in the discussion at any time without any consequences. Everything you say during our conversation today will be kept private, meaning that your name will not be included in any report or publication associated with this study or its results. We keep your information private and will aggregate your thoughts with others participating in calls, so we believe there is minimal risk to you in participating in this conversation. This information will contribute to the evidence policymakers and practitioners have about financial capability interventions delivered in Employment and Training program contexts, and how they may be helpful for adults with low incomes, but you may not experience any direct benefits from participating in the study. [IF SMALL GROUP: However, we cannot ensure confidentiality with respect to other participants in the conversation today – this means we can't guarantee that other participants won't share what they hear or think they hear today with people outside this group. Additionally, we cannot confirm that unauthorized persons are not listening to the conversation, as each webcam or audio source cannot show the entire room. We ask that participants agree not to take screenshots of the screen, recordings of the conversation, and overall agree to not divulge the contents of this discussion.] If you have any questions, please let me know.

A government agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number. The OMB number for this information collection is XXXX-XXXX and the expiration date is XX/XX/XXXX.

Are you comfortable with beginning the interview at this time?

I would like to record our conversation so I don't miss any details. No one will hear the recording except for the study team. If you prefer that we do not record today's conversation, we will take notes instead. Is it okay if I record this conversation? [IF SMALL GROUP: Please send me a private message if you are not comfortable with recording]. If you would like me to turn the recording off at any time, please let me know.

***[INTERVEIWER: PRESS RECORD and confirm by asking: "Do you give your permission for me to begin the interview at this time and record our conversation?"]***

# Virtual Site Visit Interviews

## Notes on this guide

*This guide is meant as a master guide that has questions for a number of different interviews. It is not necessary to ask all questions of all audiences; the interviewer should tailor the questions based on a) a review of what information has already been collected in earlier data collection modes; b) an understanding of the program model based on the earlier data collection and of which details will be most relevant given the model; and c) which questions are most appropriate for the staff roles and organizational roles of the various interviewees. Notes in many of the sections below provide more guidance, and the right-hand column provides suggestions of which staff roles may be most appropriate for each interviewee.*

*The legend for those recommended staff roles is as follows:*

*E&T Program Manager = ETM*

*E&T Program Staff = ETS*

*Financial Capability Program Staff Who Are Part of E&T Agency = ETFCS*

*Program Manager at Partner Organization = PPM*

*Program Staff at Partner Organization = PPS*

## A) Respondent Information

Question	Respondent
1) What is your official job title?	ALL
2) Please briefly describe your current position and primary job responsibilities.	ALL
3) What was your professional background before beginning this position?	ALL
4) Did you have any education or training before beginning this position relevant to delivering employment or financial capability services?	ALL

## B) Organization Information and Characteristics of Participants

*Notes to interviewer: Review responses from earlier data collection modes (survey, phone interview). Where possible, acknowledge and confirm information already provided.*

*Throughout interview, use "agency" instead of organization if that is more appropriate.*

Question	Respondent
1) Where is your organization located? What areas does the organization serve? a) What are some key characteristics of the service area? • Probe on demographics (e.g., race, ethnicity) and economic environment (e.g., availability of jobs, types of employers who hire program participants)	ALL
2) What are the primary programs your organization operates?	ETM; PPM
3) How large is the organization? a) About how many individuals does your organization serve in a typical year? b) What was the organization's budget in the previous year (or program year)? <i>If easily available, request a copy of any organizational charts and the most recent annual report. (Check before interview if these are already available on the organization's website.)</i>	ETM; PPM
4) What are the organization's major sources of funding (e.g., WIOA, funding from federal/state/city agencies, foundations, private contributions, fee for service, etc.)? a) What are the main sources of funding for your employment & training services? b) What are the main sources of funding for your financial capability services?	ETM; PPM
5) How would you describe the overall mission of your organization?	ETM; PPM
6) How do you see financial capability services as aligning with the overall mission of your organization? How do you see employment & training services as aligning with the overall mission of your organization?	ALL

## C) Overview of Employment & Training Services Offered

*Note to interviewer: Review responses from earlier data collection modes (survey, phone interview). Where possible, acknowledge and confirm information already provided. The purpose of this section is to obtain more detail on the main employment & training services that provide a context for delivery of the financial capability services.*

Question	Respondent
1) Does your organization offer any employment & training services? <i>If so, ask this set of questions about the partner organization; if not, skip ahead to just ask about financial capability services (Section D).</i>	PPM
2) We would like to learn a bit more about your employment & training services. <i>For each type of service, confirm understanding of delivery based on earlier data collection and</i>	ETM; ETS; PPM