

UNDERSTANDING THE VALUE OF CENTRALIZED SERVICES
INSTRUMENT 1. INTERVIEW GUIDE FOR LEADERSHIP AND ADMINISTRATIVE STAFF

Understanding the Value of Centralized Services

Interview Protocol: Leadership and Administrative Staff

This protocol will be used for leadership or administrative staff (i.e., those who do not focus on client-facing work) at lead agency or partner agencies, or a “site manager” at a centralized community resource center (CCRC). The framing of questions should be tailored to fit the context of the CCRC and the role of the staff person. It is possible that sections of this protocol will be broken up for different administrative or leadership roles, depending on the structure of the site. Interviewers should tailor the guide depending on whether questions may only need to be asked of a single person, rather than multiple leadership or administrative staff,¹ as well as based on respondent characteristics, such as whether they worked at the CCRC prior to the centralization of services.

Notes on language used:

- By “site,” we mean the CCRC itself, and “organization” describes the entity that the person works for – in some cases, that could be the same thing. We have used “[SITE NAME]” as a placeholder for referring to the CCRC, but interviewers should tailor based on how staff refer to the site, agency, or program.
- We use the term “service” throughout, but in some cases, the term “program” or more specific reference to a specific service or program might be appropriate.
- “Partners” refer to other organizations that also operate services at the same site.

A. RESPONDENT BACKGROUND

First, we’d like to learn a little about you and your role.

1. What is your role within your organization? Within [SITE NAME]?
 - a. How long have you been in that role? How long have you been at the organization overall?
 - i. *Probe on whether they have been there prior to the site centralizing services.*
 - b. What are your responsibilities? What activities or components of the program do you oversee?
 - c. Do you participate in working groups or committees in your field or community as part of your role here?

¹ Note to OMB: Estimated number of respondents accounts for the possibility of multiple respondents from the same organization or site.

2. What is your professional background? What is your educational background?

B. ORGANIZATION AND SITE BACKGROUND

Note: These questions only need to be asked of one representative of each agency or organization so interviewers should tailor accordingly.

We would like to understand more about your organization specifically.

1. Please describe your organization, including the programs and services that your organization provides.
2. Please describe the mission of your organization.
3. What geographic region does your organization serve?

Now we would like to learn more about [SITE NAME].

4. How does [SITE NAME] fit into the programs and services provided by your organization?
 - a. *Probe on whether this is the primary location for services, part of a network of CCRCs, etc.*
5. What geographic region does [SITE NAME] serve?
6. Please describe the partners that offer services at this site.
 - a. How do these partners' missions align with your organization's mission?
7. What is the organizational structure of [SITE NAME]? *Ask for a copy of their organizational chart.*
 - a. How many staff members does your organization have at this site?
 - b. How many staff members are there, total, at this site, including partner programs?
 - c. Does the administrative leadership at this site oversee multiple partners and/or programs?
 - i. *Probe on whether or how management and administration is consolidated.*

C. SERVICES

We know a bit about your services and would like to learn more about the array of services provided on site at [SITE NAME].

1. Please describe the services offered at [SITE NAME].
 - a. What services are offered in-person?
 - b. Which services are provided by which partners?
 - c. Are there key services you expect all clients to access? If so, which ones?
 - i. *Probe on primary services that the site hopes to provide to all clients, if any, as well as expected service trajectory or sequence.*
2. In addition to services provided at your site, does your site also provide referrals or applications to other services not provided at this location?
3. How are clients referred to services...
 - a. Within the CCRC?
 - b. To and from outside agencies?
 - c. *Probe on shared data systems, staff communication flow, formal/informal referrals, warm handoffs, automated or expedited referrals, referral follow-up process*
4. Are there any virtual services associated with [SITE NAME]? This could include services provided virtually, online applications, and/or services provided over the phone. *Note: Tailor if we know that virtual services or applications are available. We are interested in virtual or remote services beyond the existence of basic information available online, such as a website.*
 - a. How long have you been offering these services?
 - b. What clients are the virtual services designed to serve?
 - c. Is it for the same geographic region as your in-person services?
 - i. [IF NO] What geographic region do your virtual services serve?
 - d. How do the virtual and in-person services complement each other?
 - i. *Probe on whether clients can access both virtual and in-person services.*
 - ii. How do the virtual services differ from the services provided in person?

- iii. [IF DIFFERENT] Why are these services different? What led to the development of distinct services offerings in a virtual format as compared to your in-person services?
- iv. What are the benefits and disadvantages of virtual services and processes compared to in-person?

D. CLIENT CHARACTERISTICS AND COMMUNITY CONTEXT

Note to interviewer: We use the word “community” to refer to the area and population in which the program operates. This may be a single neighborhood or a large geographic area with multiple communities. Use appropriate terminology for the region and population served by the site. We would like to understand more about the community in which this site operates and the population that this site serves.

1. How would you describe the characteristics of the clients served at your site?
 - a. *Probe on characteristics such as age, gender, language, as well as specific needs or barriers that services are designed to address.*
 - b. What are the characteristics of individuals that you are not able to serve well at [SITE NAME]?
 - c. Do the characteristics of the clients served at your site mirror the characteristics of the population of the community and/or region in which [SITE NAME] is located?
2. What are the strengths of the community/communities? What are the key resources in the community/communities?
 - a. If you serve multiple communities, how do they differ?
3. What would you say are the primary needs in the community/communities? What barriers do clients face in accessing services and achieving the desired outcomes for the program?
 - a. *Probe on potential needs and/or barriers and for each, clarify what population of clients the respondent is referring to:*
 - i. *Barriers to self-sufficiency (e.g., education-level, employment background)*

- ii. *Access to or lack of services (e.g., availability of public transportation, location of service providers, access to housing)*
 - iii. *Language barriers*
 - iv. *Child care access or affordability*
 - i. *Other child- or parent-related needs (e.g., parenting education)*
- 4. What information do you collect or gather from the community/region/population that informs your understanding of these characteristics?
- 5. How have the characteristics you just described about the community influenced which services are offered at [SITE NAME]?
 - a. *Probe on service landscape, rural/suburban/urban setting, other characteristics previously mentioned.*
- 6. How have the community, local, or state characteristics or context influenced your ability to provide centralized services in your community?
 - a. *Probe on political context, state/local administration, service landscape in the community, etc.*
 - b. What federal, state, and/or local policies affect your ability to centralize services?
 - i. *Probe on whether certain policies make it easier or more difficult to centralize services.*
 - c. What, if any, existing or historical inequities or disparities have influenced the services provided at this site? How, if at all, have these affected your ability to centralize services?
- 7. Are there other characteristics about the community or local context that you think would be helpful for us to know?
- 8. Are there any gaps in services at your site (i.e., client needs that are not being met by the site's services)?
 - a. [IF YES] What are they?
 - i. How does your organization help clients address these gaps?

- b. Are there particular groups (e.g., based on race or ethnicity) that face more difficulty accessing services?
 - i. *If so, probe on what they are doing, if anything, to address this.*
- 9. How does your organization or [SITE NAME]'s leadership ensure that site staff are able to provide culturally responsive services to clients at [SITE NAME]?
 - a. Does [SITE NAME] employ staff from similar backgrounds, characteristics, or lived experiences of your clients? Why or why not?

E. HISTORY OF CENTRALIZED SERVICES

Note: This section will need to be tailored depending on the respondents' tenure at the organization and when they started there relative to when the site started centralizing services.

One of the goals of our study is to learn about how organizations started providing services that were centralized in one location, including the motivation to adopt this model and how it has evolved over time.

- 1. [IF LEAD AGENCY] Please describe how your organization/site first started centralizing services.
 - a. What led to the formation of [SITE NAME]?
 - b. When did [SITE NAME] begin centralizing services?
 - i. How long did your organization operate prior to centralizing services?
 - c. What goals did centralization of services address?
 - d. From your perspective, who/what organizations or individuals benefitted most from centralization? How so?
 - i. Who did not benefit? Why not?
 - e. *Probe on how the partnerships arose – was it through existing relationships, personal connections, funding opportunities, existing state or local structures?*
- 2. [IF PARTNER AGENCY] How did your organization first become involved with [SITE NAME]?
 - a. How did you begin delivering services at this site?

- b. How do you think [SITE NAME] has evolved since your organization began providing services here?
- 3. How has [SITE NAME]'s approach to centralization evolved over time?
 - a. *Probe on:*
 - i. *Changing target population*
 - ii. *Changing community needs, resources, and/or context*
 - iii. *Changing funding streams*
 - iv. *Initiatives at the local or state level*
 - b. What led to the changes?
 - c. Have there been any other changes that affected service delivery, operations, or capacity at the site?
 - d. [IF LEAD AGENCY] Has the number of partners you worked with evolved over time? How so?
 - i. If so, why did you decide to change the mix of partners over time?
 - 1. *Probe on:*
 - a. *Services needs*
 - b. *Community needs*
 - c. *Changes to community context*
 - d. *Funding changes*
- 4. How was the community/region/population/clients involved in the development of [SITE NAME]? In the services provided at [SITE NAME]?
 - a. How have you ensured that your services are responsive to the needs of the community/region/population?
- 5. In what other ways, if at all, did services and the way in which they were delivered change during the COVID-19 pandemic? *Note to interviewers: If respondent has already addressed virtual services or adding partners related to COVID-19 earlier, adjust these questions accordingly.*
 - a. *Probe on:*
 - i. *Types of services offered*
 - ii. *Changes due to new needs and resources in the community*
 - iii. *Structure of services or staffing*

- b. How did you expand or change virtual services during the COVID-19 pandemic, if at all?
- c. Which (if any) of the COVID-related changes has been/will be maintained once the pandemic is over?

F. FUNDING

Note to interviewers: These questions may be tailored if we are also interviewing finance-specific staff at this site. In addition, interviewers should assess whether all questions are relevant to partner agencies and skip if needed.

We are also interested in the funding sources for services provided at this site.

1. What are the primary sources of funding for [SITE NAME]?
2. What services or programs do these funding streams cover?
 - a. *Probe on:*
 - i. *Federal funding streams*
 - ii. *State/local funding*
 - iii. *Private funding*
 - iv. *Braided (i.e., tracked separately) or blended (comingled and cannot be separated) funding*
 - b. How are the shared costs of operating this site funded?
 - i. *Probe on funding for space/facilities, security, administration, data systems, staff*
3. How much discretion do you or your staff have in how the funding for the different streams is used?
4. How have the funding sources or funding levels changed since you began centralizing services, if at all?
 - a. [IF APPLICABLE] Since you changed the mix of partners at the site?
5. How have funding requirements (e.g., eligibility criteria, allowable uses for the funding) impacted your ability to centralize services and funding streams?
 - a. If you had more flexibility in funding, how would you use it in your centralized service model?

6. How has centralizing services affected the cost of your services, either in terms of operational costs or costs to clients? That is, has the cost of administering services increased or decreased as a result of centralizing services?
 - a. If so, what have the changes been?
 - b. Why has centralizing services contributed to increased costs or savings for [SITE NAME]?
 - i. How has this changed over time?
 1. *Probe on initial costs relative to savings over time*
 - c. What are other reasons for costs increasing or decreasing over this time period, if any?
7. From your perspective, do you think that centralizing services has helped or hindered your ability to secure new funding streams?
 - a. If so, how?

G. PARTNERSHIPS

Note to interviewer: Tailor this section depending on whether you are interviewing administrators from the lead agency or a partner organization.

Earlier, we discussed the partners that you work with at this site to provide services. Now we'd like to learn more about how your organization works with these partners, starting with administrative and decision-making roles.

1. [IF LEAD AGENCY] What is your organization's role in managing the partnerships among the organizations that provide services at [SITE NAME]?
 - a. How do you coordinate with the leadership or management of your partner organizations?
 - i. How does this vary, if at all, by partner? By type of partner?
 - ii. How do you handle changes in leadership at [SITE NAME] and partner organizations?
 1. How have these changes affected partnerships?
 - b. Do you oversee staff from partner organizations?
 - i. [IF YES] Which ones? What does this oversight look like?
 - c. How do you ensure that the mission or goals of partner organizations are aligned?

- i. Do you have shared mission statements, goals, or objectives?
 - ii. Do you have shared logic models or theories of change?
- 2. How does decision-making among partners work?
 - a. What is the relationship between the lead agency and partners when it comes to making decisions about [SITE NAME]?
 - b. Does it vary by the type of decision (e.g., services provided, funding, staff, etc.)?
 - c. How do partners communicate or collaborate to do longer-term planning?
- 3. Do you have formal agreements in place to govern your partnerships?
 - a. If so, what types?
 - i. *Probe on memoranda of understanding, contracts, etc.*
 - b. If not, what informal agreements govern your partnerships?

Now we'd like to understand how you coordinate services between the organizations at [SITE NAME].

- 4. Please describe how you coordinate services between your organizations.
 - a. Do you have common intake processes or applications for clients?
 - b. Do you have common eligibility or program requirements?
 - c. Do you refer clients between programs?
 - d. Do you proactively handoff clients between your organizations (e.g., a "warm handoff")?
 - i. *Probe on whether they introduce clients directly, share information prior to referrals, etc.*
 - e. How often do clients at [SITE NAME] receive services from multiple partners?
 - i. What are some common combinations of services that clients receive?
- 5. How do you communicate with your partners?
 - a. How does this vary by different staff role (e.g., administrative, leadership, frontline staff)?

- b. How does this vary by topic (e.g., program development, client needs, funding, staffing, space, etc.)?
 - c. Do partners have working groups, committees, or task forces to tackle shared problems or review processes?
 - i. How often do these groups meet?
 - ii. How are the meetings structured, and what topics are typically covered?
 - iii. Are clients included in these groups? If so, how?
 - 1. How do you include client perspectives, if at all?
6. How is staff training coordinated or leveraged across the partner organizations at [SITE NAME]? This could include new staff orientation and/or ongoing staff training.
- a. *Probe on whether they train staff jointly, pool resources to train staff across organizations, develop train-the-trainer models across partner organizations*
7. [IF LEAD AGENCY] Do you provide training to staff across partner organizations? This could include new staff orientation and/or ongoing staff training.
- a. If so, what does this common training cover?
 - b. If not, how do you ensure staff are all on the same page about procedures, requirements, etc.?
8. [IF PARTNER] Do your staff at this site receive the same training as that of [LEAD AGENCY]?
- a. How do you ensure that this aligns with the training provided to staff through your own organization?
9. What are your future goals for your partnership(s) at [SITE NAME]?

H. OUTCOMES AND DATA

Note to interviewer: These questions may only need to be asked of one person from each organization. Please tailor accordingly.

We are interested in learning about how sites such as yours help clients achieve the outcomes that the services are designed to help them achieve and how these outcomes and goals are aligned across the different partners at [SITE NAME].

1. What are the desired outcomes for clients in each program?

- a. How do these differ across programs within [SITE NAME]?
 - b. Are there any joint performance metrics or shared logic models?
 - c. How do you define success for clients in your program?
 - i. How does this align with other programs at [SITE NAME]?
 - d. Are there participation measures or other metrics shared across the different partners at [SITE NAME]?
2. Do you have reports or aggregate information on clients you can share with us about outcomes, number of individuals who received services (for each organization and across organizations), client demographics, etc.?
 - a. How many individuals and families have been served by the programs and by the [SITE NAME] in the past year? Since [SITE NAME] was formed?
 3. Do you report any data to government agencies?
 - a. [IF YES] Which ones? What information do you report?
 4. How would you describe the outcomes that clients have achieved?
 - a. *Probe here on actual statistics or anecdotal information on client outcomes.*
 5. Have there been any studies, research projects, or evaluations that have examined the implications of centralization at [SITE NAME]?
 - a. [IF YES] What were the conclusions from that study? *Ask for a copy of a report or where we could find this information.*
 6. Do you share data with partners? If so, how do you share data?
 - a. What data do you share?
 - b. How do you use these data?
 - i. *Probe on reviewing data or performance metrics with partners.*
 - c. Are there data you wish you collected but don't?
 - i. *Probe on data that could support centralization of services or coordination between partners.*
 - d. Do you share a data system with partners?
 - i. [IF YES] How do you ensure that a shared data system meets the needs of all programs and/or partners involved?

I. CHALLENGES, PERCEPTIONS, AND LESSONS LEARNED

Finally, we would like to get your thoughts on what the challenges and successes of centralizing services at your site has been, as well as what information, lessons learned, or advice you would share with other organizations seeking to consolidate services in a single location.

1. From your perspective, what are the benefits to centralizing services in one location?
 - a. *Probe on:*
 - i. *Better and/or more efficient services and/or outcomes for clients, including how to connect clients with a broad array of services*
 - ii. *Efficiencies in staff time*
 - iii. *Reductions in cost*
 - iv. *Efficient use of resources*
 - v. *Improved staff morale, employee engagement, staff retention*
 - b. What do you think are the benefits for clients?
 - c. Is centralizing services more beneficial for some clients than others?
 - i. [IF YES] How so? Why?
 - d. What do you think are the benefits for staff?
2. From your perspective, what are the challenges or disadvantages to centralizing services in one location?
 - a. *Probe on:*
 - i. *Challenges for clients*
 - ii. *Challenges aligning services and program requirements*
 - iii. *Challenges aligning mission and objectives*
 - iv. *Challenges coordinating across different staff roles*
 - v. *Increased cost*
 - vi. *Funding*
 1. *Obtaining funding*
 2. *Aligning funding restrictions or requirements*
 - b. What do you think are the challenges or disadvantages for clients?

- c. Does centralizing services create more challenges for some clients than others?
 - i. [IF YES] How so? Why?
 - d. How has [SITE NAME] responded to these challenges for clients?
 - i. How does this vary by client characteristics (e.g., age, family structure, needs, or site-specific characteristics mentioned), if different clients face different challenges?
Note to interviewer: Probe on client characteristics described earlier in the interview.
 - e. What do you think are the challenges or disadvantages for staff?
 - i. How have your organization and partner organizations worked to address these challenges for staff?
3. From your experience, what are your clients' perceptions of the services provided at this site?
- a. Does your organization collect feedback from clients?
 - i. *Probe on whether [SITE NAME] systematically collects feedback from clients (e.g., client satisfaction survey) or other information on client perceptions of services.*
 - ii. [IF SITES COLLECT FEEDBACK] How does your organization collect feedback from clients?
 - iii. How does your organization use client feedback when [SITE NAME] is designing services or making other programmatic decisions?
 - b. What are the clients' perspectives on how well [SITE NAME] meets their needs?
 - c. What improvements would they suggest?
 - d. [DEPENDING ON TENURE OF RESPONDENT] Do you think client experience has improved since you began centralizing services? If so, why? If not, why not?
4. What key implementation challenges have your organization and your partners encountered when centralizing services?
- a. What specific strategies have you used to overcome the challenges?

- b. *Probe on challenges related to initial centralization of services, ongoing challenges, challenges related to adding or reducing partners, and how implementation challenges may have changed or evolved over time.*
- 5. What factors or facilitators have helped you centralize services?
 - a. *Probe on supports such as funding streams that helped centralize, individual champions, policy changes, etc., that contributed to the centralization of services*
 - b. *Probe on factors related to initial centralization of services, ongoing factors, and how factors may have changed or evolved over time.*
- 6. What are the efficiencies of the centralized approach? What are the tradeoffs?
- 7. What challenges, successes, or lessons learned do you have from your experience in serving clients during the COVID-19 pandemic?
- 8. [IF APPLICABLE] From your perspective, how have virtual services contributed to [SITE NAME]'s to meet clients' needs?
 - a. What are some benefits, disadvantages, and costs to providing virtual services?
- 9. How would you like to see [SITE NAME] evolve in the next 5 years?
 - a. *Probe on increased/decreased centralization, more/less intense relationships, new partners/services, geographical expansion, maintaining the status quo*
- 10. What information would you share with other organizations who are considering centralizing services?
 - a. *Probe on:*
 - i. *Advice*
 - ii. *Best practices*
 - iii. *Lessons learned*