

**UNDERSTANDING THE VALUE OF CENTRALIZED SERVICES
INSTRUMENT 2. INTERVIEW GUIDE FOR FRONTLINE STAFF**

Understanding the Value of Centralized Services

Interview Protocol: Frontline Staff

This protocol will be used for staff who directly serve clients. They could be employed by the lead agency or partner organizations. The framing of questions should be tailored accordingly. In addition, interviewers should identify when the site initially started centralizing services and tailor the questions accordingly based on the tenure of the staff person, especially for questions related to comparisons before and after centralization.

Notes on language used:

- By “site,” we mean the centralized community resource center (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.

Please see the document “VOCS Consent – Staff and Leadership” for the consent form.

A. RESPONDENT BACKGROUND

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

1. What is your role within your organization?
 - a. *Note to interviewer: Make sure you understand here which program(s)/services this person represents.*
2. How long have you been in that role?
3. How long have you been with this organization?
 - a. *Probe on whether they have been there prior to the site centralizing services.*
4. What is your professional background? Your educational background?
 - a. *Probe on previous experience with partner organizations or across programs provided at the site.*
5. Do you consider yourself part of the community [SITE NAME] serves?
6. What drew you to working at this organization?

B. 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. Before we dive into your work, we’d like to hear about the clients you serve and the surrounding community/communities.

1. How would you describe the characteristics of the clients served at [SITE NAME]?
 - 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 clients are you not able to serve well at [SITE NAME]?
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*
 - v. *Other child- or parent-related needs (e.g., parenting education)*
4. 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.*

5. Are there other characteristics about the community or local context that you think would be helpful for us to know?

c. SERVICES

Note to interviewer: Tailor this section depending on whether the staff role, such as whether the staff person provides services for multiple programs or specializes in a single program. You may also have to adapt depending on whether you are interviewing individuals at similar roles across different organizations.

We would like to learn about the services that you provide at [SITE NAME] and how you work with clients.

1. What is the typical client flow? Please describe how clients enter and progress through the program(s) or services at your site.
 - a. What are the entry points for clients at [SITE NAME]?
 - i. Probe on:
 1. Referrals
 2. Applications for services
 3. Walk-ins
 4. Virtual entry points
 - ii. How do clients find out about services at your center?
 1. What types of outreach do you do?
 - a. Probe on if, how, and why certain types of outreach are prioritized over others
 2. In your role, what decisions do you make that influence the service array that clients receive?
 - b. How do you determine eligibility for clients?
 - i. Do you screen for eligibility for other services or partners at the same time?
 1. [IF YES] Which services/partners?
 - c. How does this vary for different programs or services offered in your site?
 - d. How does this vary for clients with different characteristics (e.g., age, family structure, needs)?
 - e. How do you assess client needs, before or after enrollment at [SITE NAME]?

- i. Do you share this information with partners at [SITE NAME]?
 - f. How do staff communicate about clients as they progress through the program/services?
 - g. 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. How and when are clients referred to services...
 - a. Within the CCRC?
 - b. To and from outside agencies?
 - c. How active are clients in this process?
 - d. *Probe on shared data systems, staff communication flow, formal/informal referrals, warm handoffs, automated or expedited referrals, referral follow-up process*
- 3. How often does the average client receive services at your site?
 - a. How does this differ for the different programs/services operated at your site?
 - b. How does this vary by client or client characteristics?
 - c. How often do you communicate with clients/families during the time they are receiving services?
- 4. How long does the average client typically receive services at your site?
 - a. How does this differ for different programs/services operated at your site?
 - b. How does this vary by client or client characteristics?
- 5. How much flexibility and/or discretion do you have in decision-making regarding the services a client receives or is referred to?
 - a. *Probe on determining whether to make referrals or connect to other services, discretion over determining eligibility for services, etc.*
- 6. Are there gaps in the services offered at [SITE NAME] (i.e., client needs that are not being met by the site's services)?

- a. [IF YES] What are the gaps?
 - i. What other services do you think would be beneficial for clients?
 - ii. How do you help clients fill those gaps?

Note: Tailor if we know that virtual services or applications are available. We are interested in virtual or remote services beyond just the existence of a website.

We're also interested in the services that are available to clients online and/or over the phone. This could include remote services or applications available through [SITE NAME]'s website or services that staff provide on the phone.

7. What services does [SITE NAME] offer virtually?
 - a. *Probe for one-on-one services, group sessions, and applications, as well as differences between services offered through the umbrella organization or partners and services affiliated specifically with the CCRC.*
 - b. How are you involved with the services that are offered virtually?
 - i. For example, do you develop virtual services, conduct virtual workshops, refer clients to virtual services, or help clients navigate virtual services?
 - c. Do any clients receive services exclusively online?
 - i. [IF YES] Do you interact with these clients at all?
 - d. How do the virtual services available differ from the services provided in person?
 - i. [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?

D. PARTNERSHIPS

We have heard a little bit about how you work with partners at your site and we would like to hear more about how you collaborate to serve clients.

1. Please describe the partners that you work with to provide services at this site and how you interact with them.
 - a. How often do clients at your site receive services from multiple partners?

- i. What are some common combinations of services that clients receive?
 - b. Are there partnerships you think need to be formed or strengthened to better meet clients' needs?
 - i. *Probe on what challenges exist develop these partnerships.*
- 2. How do you communicate with partners about your clients?
 - a. Do you have regular meetings to discuss specific clients?
 - i. [IF YES]
 - 1. What is the goal of the communication?
 - 2. How are the meetings structured, and what topics are typically covered?
 - ii. [IF NO] *Probe on less formal communication or coordination with partner staff.*
- 3. What other agencies do you partner with outside of [SITE NAME]?
- 4. [IF LEAD AGENCY] Do you receive training with staff from partner organizations?
 - a. If so, what does this common training cover?
 - i. *Probe on common procedures, goals, tools, etc.*
 - ii. Who provides this training?
 - 1. *Probe on training provided by lead agency or partner organizations.*
 - b. If not, what type of guidance about procedures, requirements, etc., do you receive about the different services provided at [SITE NAME]?
- 5. [IF PARTNER STAFF] Do you receive training provided by [LEAD AGENCY] or other partner organizations at [SITE NAME]?
 - a. [IF YES] What type of training? What information is covered in the training?

E. OUTCOMES AND DATA

Now we would like to talk about the goals and outcomes for clients in your program, how these align with other services at your center, and how you keep track of information on clients.

- 1. What are the desired outcomes for clients in your program?
 - a. How do these differ across programs within [SITE NAME]?

- b. How do you define success for clients in your program?
 - i. How does this align with other programs at your center?
- 2. What performance measures or goals does your organization monitor for your program?
 - a. Are these the same or different from those for the partner programs at [SITE NAME]?
- 3. From your perspective, to what extent do clients achieve these outcomes?

We would also like to learn about the data systems you use and how you collect client data.

- 4. How do you track information on clients?
 - a. Please describe your data system(s).
 - b. What types of information do you track?
 - i. *Probe:*
 - 1. *Client outcomes*
 - 2. *Participation measures*
 - 3. *Demographic information*
 - ii. Are these measures the same as those tracked by other services/partners at your site?
- 5. Do you share a data system with partners?
 - a. How does the shared system enable collaboration, if at all?
 - i. *Probe on who owns the data system and whether partners can enter data into the system or whether it also includes functionality such as shared client files, electronic referrals, etc.*
 - b. [IF PARTNER AGENCY] How do you access the data system?
 - c. [IF PARTNER AGENCY] Do you face any challenges in using a system external to your agency?
 - d. If not, how do you share information on clients (i.e., do you share data in another way)?
 - i. What is the consent process to share information across partners, if any?

- ii. How do you ensure that client privacy is protected when sharing data?
- 6. How do you use the data that you collect?
 - a. Do you work with partners to review data or performance metrics?
 - i. [IF YES] How so? What type of data do you review?

F. CHALLENGES, PERCEPTIONS, AND LESSONS LEARNED

Finally, we want to hear from you about what you think has been successful about providing services centrally at [SITE NAME] and what the challenges are, both for you and for your clients. We also want to hear about recommendations you would give to other organizations considering centralizing services.

1. From your perspective, what are the goals of providing multiple services in a single location? *Note that interviewer should customize this question based on the site's model.*
2. From your perspective, what are the benefits to centralizing services in one location?
 - a. What do you think are the benefits for clients?
 - b. Is centralizing services more beneficial for some clients than others? How so?
 - c. What do you think are the benefits for staff?
3. From your perspective, what are the challenges or disadvantages to centralizing services in one location?
 - a. What do you think are the challenges or disadvantages for clients?
 - i. What kinds of needs or challenges come up that you and your partners are not well positioned to help with?
 - b. Does centralizing services create more challenges for some clients than others? How so?
 - i. If so, how has [SITE NAME] responded to these different challenges for certain clients?
 - c. What do you think are the challenges or disadvantages for staff?
4. How has [SITE NAME] addressed these challenges?
5. What ongoing work, if any, is in progress to resolve these challenges?

6. What, if any, work is planned to address these challenges?
7. From your experience, what are your clients' perceptions of the services provided at this site?
 - a. *Probe on whether [SITE NAME] systematically collects feedback from clients (e.g., client satisfaction survey) or other information on client perceptions of services.*
 - b. What are the clients' perspectives on how well your site meets their needs?
 - i. From your perspective, are clients' cultures and identities respected and responded to during all interactions?
 - c. How satisfied have they been with the combination of services offered at [SITE NAME]?
 - d. What improvements would they suggest?
 - e. What gaps in the types of services offered at [SITE NAME] might a client identify?
 - f. How is client feedback used when designing or planning services?
 - g. [DEPENDING ON TENURE OF STAFF PERSON] Do you think client experience has improved since you began centralizing services? If so, why? If not, why not?
8. [IF APPLICABLE] From your perspective, how have virtual or phone services affected your ability to meet clients' needs?
 - a. What are some benefits, disadvantages, and costs to providing virtual services?
9. What has been successful about your partnerships? What has been challenging?
 - a. *Probe to understand the variation in success of some partnerships over others and why.*
10. What challenges, successes, or lessons learned do you have from your experience in providing centralized services to clients during the COVID-19 pandemic?
11. What information would you share with other organizations who are considering centralizing services?
 - a. *Probe on:*

- i. Advice*
- ii. Best practices*
- iii. Lessons learned*