

**UNDERSTANDING THE VALUE OF CENTRALIZED SERVICES**  
**INSTRUMENT 3. INTERVIEW GUIDE FOR FINANCE STAFF**

## Understanding the Value of Centralized Services

### Interview Protocol: Finance Staff

This protocol is designed for staff members who oversee the centralized community resource center (CCRC) finances, not necessarily finance staff from different partners. However, this protocol may need to be tailored depending on the different roles or structures at each CCRC. 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 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 the organization?
  - 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.*
2. What is your professional background? Your educational background?

#### B. FUNDING

We have heard about the services your organization provides from your colleagues. We would like to learn about the funding and financing of the services at this site and how this impacts your ability to provide centralized services at this site.

1. What are the primary sources of funding for [SITE NAME]?

- a. *Probe on:*
  - i. *Federal funding*
  - ii. *State/local funding*
  - iii. *Private funding (e.g., foundation funding)*
  - iv. *Braided (i.e., tracked separately) or blended (comingled and cannot be separated) funding*
2. What services or programs do these funding streams cover?
  - a. How are site or program costs allocated to different funding streams?
  - b. How does this vary for different types of costs, if at all?
3. How are the shared costs of operating this site funded?
  - a. *Probe on funding for space/facilities, security, administration, data systems, staff*
  - b. Do you receive funding to specifically support centralization and coordination across site partners?
    - i. If so, from what sources?
4. Do you receive in-kind (non-monetary) contributions?
5. How do you ensure compliance or that your agency is meeting requirements for all funding streams?
  - a. How does this work for blended or braided funding sources? For in-kind contributions?
  - b. How has centralizing services impacted your ability to meet the requirements of your funding, if at all?
6. What restrictions are there on how funding can be used? How does this affect your ability to fund services at [SITE NAME], if at all?
7. Which sources of funding are flexible in how they are used? How does your organization use those funds?
8. How much discretion do you or your staff have in how the funding for the different streams is used?
9. How have the funding sources changed over time, if at all?
  - a. How have funding sources changed as [SITE NAME] has added other partners or programs?
10. 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 your organization?
  - c. What are other reasons for costs increasing or decreasing over this time period, if any?
11. From your perspective, do you think that centralizing services has helped or hindered your ability to secure funding from new or existing streams?
- a. If so, how?
12. From a finance perspective, what are the efficiencies of the centralized approach? What are the tradeoffs?

### C. PARTNERSHIPS

*Note to interviewer: Some of this may be covered in Section B (Funding). Adapt as needed.*

Now we would like to discuss the partners that also provide services at this site and how you coordinate with them from a financial perspective. We've learned about the partners that provide services here from your colleagues.

1. Do you have formal agreements in place with partners?
  - a. If so, what types?
    - i. *Probe on memoranda of understanding, contracts, cost-sharing agreements*
  - b. If not, what agreements govern your partnerships?
2. How do you communicate with partners?
  - a. Do partners have working groups, committees, or task forces to deal with topics related to funding or finance?
    - i. How often do these groups meet?
    - ii. How are the meetings structured, and what topics are typically covered?
3. How does decision-making among partners work?
  - a. *Adapt as needed based on the administrative structure of the site.* What is the relationship between the lead agency and

partners when it comes to making funding decisions about [SITE NAME]?

4. Do you work with partners to share finance data as part of reporting requirements?

#### D. CHALLENGES, PERCEPTIONS, AND LESSONS LEARNED

Finally, we're interested in hearing about how the process to provide multiple services at a single location has been successful or challenging and what lessons learned you would like to share.

1. From your perspective, what are the benefits to centralizing services in one location?
  - a. *Probe on:*
    - i. *Efficiencies in staff time*
    - ii. *Reductions in cost*
    - iii. *Efficient use of resources*
2. From your perspective, what are the challenges or disadvantages to centralizing services in one location?
  - a. *Probe on:*
    - i. *Challenges aligning services, mission, staff roles*
    - ii. *Increased cost*
  - b. How has your organization responded to these challenges?
3. What information would you share with other organizations who are considering centralizing services?
  - a. *Probe on:*
    - i. *Advice*
    - ii. *Best practices*
    - iii. *Lessons learned*