Understanding the Value of Centralized Services
Instrument 4. Interview Guide for IT/Data Staff

Understanding the Value of Centralized Services

Interview Protocol: IT/Data Staff

This protocol is designed for staff at the centralized community resource center (CCRC) who oversee IT and/or data systems and tracking. It may be the case that one person oversees these different functions, or they could be different individuals. Interviewers should tailor as needed. 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. *Please share the table at the end of this protocol with the staff ahead of time. They can either fill it out or just walk through it during the protocol, but it will help them understand the type of information we hope to learn.*

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?
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?

B. DATA SYSTEMS AND METRICS

If the respondent prepared the table in Appendix A, review responses with them and clarify any missing or incomplete responses.

1. Please describe each data system that your site uses to track information on clients and their families (when applicable).
    a. Which programs use this system to track information?
    b. Are programs required to use this system?
    c. To what extent is this system integrated with data systems of other organizations?
        i. *Probe on levels of access to data systems of other organizations (ability to view client data, input data, link data)*
    d. Who is responsible for entering information into the system?
    e. Who sees or accesses information in the system?
    f. Who is responsible for maintaining the system and providing support to users?
    g. Can you retrieve reports from the system?
    h. Was the system developed in-house or commercially available to purchase/use?

We're also interested in the type of information your organization and partners track about clients.

2. Do you have a data dictionary? *If possible, ask for a copy of their data dictionary.*
    a. Is it shared across programs?
3. How do you define a household/family within your data system?
    a. Probe on whether it is based on how the household presents itself, the formal relationships of the household, are noncitizens included or excluded.
4. Which field(s) of data is most accurate and why? Which field(s) is least accurate and why?
5. What specific participation measures do you track?
6. What outcome measures do you track?
7. What demographic information do you track?

8. Do you share a data system with partners?
    a. [IF YES] How do you ensure that a shared data system meets the needs of all programs and/or partners involved?
        i. How do you work with staff at other organizations to ensure smooth integration of data systems?
        ii. Do you provide training to staff members at other organizations on how to use the data system?
9. Do you share data with partners?
    a. [IF YES] What type of data do you share?
        i. How often do you share data?
        ii. For what purpose do you share data?
        iii. What is the consent process to share information across partners, if any?
        iv. How do you ensure that client privacy is protected when sharing data?
    b. *Probe on providing reports, client files, other information to partners.*
10. How are data (participation, outcomes, demographics, or other) used?
    a. *Probe on Continuous Quality Improvement practices, reporting requirements for funding, etc.*
    b. *Probe for different ways the data are used by the CCRC as a whole compared to specific partner agencies.*
    c. Do you have access to any reports or aggregate information on clients you can share with us?
        i. *Probe on outcomes, demographics, service take-up, etc.*
        ii. Do you report client outcomes or participation metrics disaggregated by community, race, family size, program, etc.?
11. What is the process to modify the system(s) (if possible)?
    a. Does it require permission from a partner or funder?

[IF SITE PROVIDES SERVICES OR APPLICATIONS VIRTUALLY]

1. Please describe the services that your organization offers virtually (i.e., services provided remotely that a client can access via phone, computer, or tablet).
    a. How was this service developed?
    b. What was your role in developing virtual services?
2. How, if at all, were your existing systems adapted to enable virtual access?
    a. *Probe on adapting staff access to data systems virtually and adapting in-person client services to be available online.*

C. PARTNERSHIPS

Note to interviewers: Some of this may be covered in the previous section on data and shared systems. Tailor as needed.

1. Please describe how your organization works with partners to provide data and technology services (client-facing and otherwise) at this site.
2. How do you communicate with partners about data and IT?
    a. How does this vary by different staff role (e.g., administrative, leadership, frontline staff)?
    b. Do partners have joint working groups, committees, or task forces to tackle shared problems or review processes related to data and IT?
        i. How often do these groups meet?
        ii. How are the meetings structured, and what topics are typically covered?
    c. Do you provide support to partner staff on the IT systems and/or website?
3. Do you have formal agreements in place, such as data sharing agreements?
    a. [IF YES] What do these agreements cover?
4. Do you provide training to staff across different organizations?
    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.?
5. 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.)?

D. CHALLENGES, PERCEPTIONS, AND LESSONS LEARNED

1. From your perspective, what are the benefits to centralizing services in one location?
2. From your perspective, what are the challenges or disadvantages to centralizing services in one location?
    a. How has [SITE NAME] addressed these challenges?
        i. *Probe on how their IT infrastructure, data systems, or virtual platforms have helped them address challenges.*
3. What are the efficiencies of the centralized approach? What are the tradeoffs?
    a. How do you feel that the data sharing arrangement or IT systems you have in place has helped or hindered your site's ability to provide centralized services to clients?
4. From your perspective, how have virtual services contributed to your ability to meet clients' needs?
    a. What are some benefits, disadvantages, and costs to providing virtual services?
5. What are your upcoming goals or planned changes regarding data and IT at [SITE NAME]?
6. What information would you share with other organizations who are considering centralizing services?
    a. *Probe on:*
        i. *Advice*
        ii. Best practices
        iii. *Lessons learned*

Appendix A

Send table shell ahead of time for respondents to prepare and walk through responses during interview. It may be the case that not all systems fit cleanly into these different columns/rows (e.g., multiple programs may use a system but only one is actually required to use it), but we can use this as a guide to describe the information we hope to learn about their data systems:

Data System	Which programs use this system to track information?	Are programs required to use this system?	Is this system integrated with other systems?	Who is responsible for entering information?	Who sees/ accesses information?	Who is responsible for maintaining the system and providing support to users?	Can you retrieve reports from this system?	Was the system developed in-house or available to purchase/use?
1.								
2.								
3.								
4.								
5.								