UNDERSTANDING THE VALUE OF CENTRALIZED SERVICES
APPENDIX D

Front door observations

Office location (if there are multiple):

Note: If possible, it may be feasible to ask for a tour of the facility and gather some of this information during the tour.

1. *Before the visit:* What information is available on the CCRC website about the range of services provided?
    a. Is there a single website and/or phone number for all available services?
    b. Is there a shared application for multiple services?
    c. Does the website advertise ways to get more information (e.g., an orientation session)?
    d. How accessible is the site? Is it near major transportation lines (e.g., buses, trains)? Is it near a central area or far from other business or transit hubs?
    e. Do photos on the website reflect diversity, or the demographics of the population served by the CCRC?
    f. Is information available in multiple languages?
    g. Does the website have a direct messaging focused on inclusion, equity, commitment to anti-racism, etc.?

2. Describe the set-up of the lobby (or lobbies, if there are multiple):
    a. Furniture arrangement (e.g., is there a place to sit), room décor (e.g., encouraging messages or posters)
    b. Is there a space for children? Is child care available on site?
    c. Visual representations of a commitment to diversity, equity, and inclusion (e.g., displays welcoming and affirming LGBTQ people, photos that reflect the diversity in the community, information

available in different languages, parenting images of fathers and mothers)

d. How many staff are there to help clients who come in?
e. How many people are in line or waiting to be seen?
f. Is there a single intake line?

3. What information is available in the lobby(ies) of the CCRC about the different services available?
   a. What is the range of media used to share information (e.g., videos, posters, brochures)?
   b. Collect brochures or flyers on different programs.
   c. Take notes of what information is posted on the wall in the lobby area about different programs available.
   d. Is information available in multiple languages?

4.

Program services observations (information session, orientation, or program workshop)

Service observed:

Date: **Site:**

Number of participants: **Start Time:**

Provider (s): **End Time:**

1. Describe the setting: equipment available/used, table/chair arrangements, room décor, other notable elements.

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2. Who is leading the session (staff role(s))?
    a. Is it clear what program or service the staff member represents?
    b. How does the staff person(s) introduce themselves?

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3. What is the target population for this session (e.g., new clients)? What is the purpose of the session? Is it a program requirement to attend?

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4. Briefly outline the topics covered and activities conducted, and roughly how much time was spent on each. If multiple programs or services were discussed, note any elements of centralization you notice (e.g., a common application, coordinated service delivery).

5. What methods of facilitation were used (presentation, large group discussion, small group discussion, individual assessment activities)? Note any handouts given or materials used.

6. What are the next steps for those who participated in this session?

7. What are your general impressions and takeaways?
    a. *Was the information presented clear, engaging, and informative, etc.?*
    b. *How much the services discussed appeared to be centralized.*
    c. *To what extent did the programs or services discussed come across as different programs or organizations? How much did they seem to be coordinated?*

Partnership meeting (staffing, committee meeting, etc.)

Meeting observed:

Date:

Number of participants:

Provider(s):

Site:

Start Time:

End Time:

1. Describe the meeting. What is its purpose (e.g., to discuss client cases, partnership logistics, specific initiatives)? Who is participating?

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2. Who is leading the meeting? How are different partners engaged throughout the meeting?

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3. What topics are discussed? For example, do they discuss specific clients, administrative issues, staffing, funding, or other initiatives?
    a. What language do staff use to discuss clients? Do they use inclusive language? Do they use stereotyping language? Does language use vary by client characteristic or by partner program?
    b. Is there any evidence of community or participant input in decision making?

4. Takeaways: Describe evidence of different levels of coordination.
    a. How did the partners work together? Was there evidence of joint decision-making, funding, staffing, training, etc.? Was there evidence of mutual respect, willingness to compromise, and/or clear roles and responsibilities among group members?
    b. Do the right people seem to be participating (i.e., are they able to speak for their program/organization on the topic being discussed, are there perspectives that are missing)?
    c. What challenges were evident from the discussion?
    d. What seemed to work well?