

# Instrument 2: Technical Assistance (TA) Funder Interview Protocol for Environmental Scan

## Interview Facilitation Guide

We have 4 senior interviewers who will be conducting the interviews given their particular focus and expertise. To support the fidelity of implementation, we have outlined guidance to be used in each interview session.

1. Introduce the interviewer(s).
2. Explain the purpose of the study and topics to be covered in the interview. Interviewers will read the following statement to interview respondents at the beginning of each interview:

*We are conducting this interview as part of the Administration for Children and Families (ACF) Data Governance Consulting & Support project focused on assessing technical assistance supporting states, localities, and Tribes' data integration for statistical and research purposes. This study is being carried out under a contract for the U.S. Department of Health and Human Services by SRI International (SRI), an independent, nonprofit research institute, and AnLar, a technical assistance and research organization. The study is not intended to examine the outcomes of your agency/foundation nor will findings be attributed to you.*

*We are conducting interviews to understand the landscape of available technical assistance and support to states, localities, and Tribes related to data sharing, linking, and integration for statistical and research purposes. We are talking to multiple agencies/foundations, including yours, to learn about the technical assistance, products, and supports available to various audiences. The information you provide will be used to better understand the landscape of current technical assistance available. Upon completion of the study, findings will be available for the general public.*

3. Explain the provisions for protecting respondent's privacy. Interviewers will read the following statement to interview respondents at the beginning of each interview:

*As part of the study, the study team will share its findings with the U.S. Department of Health and Human Services. However, the results of the interviews will be summarized across all the TA funders participating in interviews. Individuals will not be identified by name in any form of analysis or report, and data will be reported in a manner that does not reveal your identity. In addition, when we need to use quotes to help illustrate the findings, we will use them anonymously. Except for what is already public, the study team will store all data collected for the study in secure environments and will protect the confidentiality of the information you provide. Finally, your participation in this interview is voluntary and you may decline to respond at any time.*

4. Advise the respondent that the interview will last approximately 45–60 minutes.
5. Explain that a member of the study team may follow-up by phone to clarify responses to interview questions.
6. Invite questions from the respondent.
7. Ask permission to audio record the interview using the following statement:

*We would like to record this conversation to ensure that we accurately capture your comments. If you agree, we would retain the recording only until we can validate the notes, at which point the voice recording would be destroyed. The transcripts will be destroyed at the end of the study. If at*

*any point you would like to say something off the record, I will stop the recording. Do you agree to allow us to record the interview?*

8. Confirm respondent's current role within the agency/foundation.
9. After the interview, please write an analytic memo in OneNote to capture key themes and quotes you heard during the interview.

Notes: (1) Before conducting interviews, interviewers will review relevant data collected as part of the environmental scan (e.g., description of the TA center, resources and documents the TA center has created to support data linkage and integration for research purposes, relevant case studies). (2) Interviewers will be directed to seek clarification of any response they judge to be vague or incomplete. The primary strategy for seeking clarification will be to ask respondents to provide specific examples to illustrate their responses. A second strategy will be to ask respondents to "say more" or to "expand on" or "explain the meaning of" a particular comment.

## Interview Questions

Structured Questions	Follow-up Prompts
<b>Background (appx. 5 mins.)</b>	
1. How long have you been in your current role as [ROLE NAME]?	
2. What are your responsibilities related to overseeing TA centers or organizations that focus on data linkage and integration for research or statistical purposes?	
<b>Funding (appx. 10–15 mins.)</b>	
3. Which TA center(s) and/or organization(s) does your [agency/foundation] fund that focus on providing supports for data sharing, linkage, and integration for research and statistical purposes?	<ul style="list-style-type: none"> <li>• How long is the initial term of funding?</li> <li>• <i>[If not already collected from preliminary environmental scan research]</i> What is the substantive area (e.g., early childhood, education, health, housing) of each TA center/program?</li> </ul>
4. How did your [agency/foundation] get involved with funding projects or organizations that provide support on data integration, linkage, and sharing for research purposes?	<ul style="list-style-type: none"> <li>• What is the motivation or rationale for funding TA to support the development and use of integrated data systems?</li> <li>• What specific issues is your [agency/foundation] trying to address by funding TA to support the development and use of integrated data systems?</li> <li>• How many years has your [agency/foundation] provided financial support to these TA center(s) and program(s)?</li> </ul>
5. What, if any, challenges are there to funding TA to support data integration, linkage and sharing for research and statistical purposes?	<ul style="list-style-type: none"> <li>• How do you know if the work has been successful?</li> </ul>
<b>Resources and supports (appx. 15–20 mins.)</b>	
6. What, if any, requirements, or guidance, does your [agency/foundation] provide with respect to the types of TA, resources, and supports a TA center/organization must provide?	<ul style="list-style-type: none"> <li>• Does your agency/foundation require the TA center(s)/organization(s) you fund to provide specific levels of TA (e.g., universal, targeted, tailored)?</li> <li>• Does your agency/foundation provide guidance about how the TA center(s)/organization(s) you fund should incorporate TA best practices (e.g., having consistent communication with TA recipients, differentiating support, and using adult learning strategies)?</li> <li>• What do you see as the most critical resources and supports related to data sharing, linkage, and integration offered by the [TA center(s)/organization(s)] that you fund?</li> </ul>
7. What, if any, requirements, or guidance does your [agency/foundation] provide with respect to the types of technical topic areas related to integrated data systems and data	<ul style="list-style-type: none"> <li>• <i>[Prompt if needed with the following examples: purpose/vision, data governance, legal agreements, technical infrastructure, capacity, data use, impact, sustainability.]</i></li> </ul>

Structured Questions	Follow-up Prompts
linkage more generally that a TA center should address?	
8. What impacts have you observed as a result of funding this TA center/organization to provide resources and supports for integrated data systems and data linkage?	<ul style="list-style-type: none"> <li>• <i>[Probe for increased capacity, new questions answered, problems/issues solved, a specific example; ask if there are any written case study examples they can share if not already provided on their website]</i></li> <li>• How are TA impacts measured and determined? (e.g., informal observations, pre-/post assessments, structured evaluations)</li> </ul>
9. Are there resources and supports related to developing and using integrated or linked data that are not currently available, that your [agency/foundation] wants to fund in the future?	<ul style="list-style-type: none"> <li>• If so, what are they?</li> <li>• Why do you think it is important to fund?</li> </ul>
<b>Coordination, collaboration, and cooperation with other TA Groups (appx. 10 mins.)</b>	
10. To what extent does your [agency/foundation] collaborate with other agencies or foundations that also fund or oversee TA centers/organizations that support the development and use of linked data and integrated data systems?	<ul style="list-style-type: none"> <li>• With what other agencies/foundations do you coordinate?</li> <li>• What factors served as an impetus to coordinate or collaborate with these other agencies/foundations?</li> <li>• What strategies or processes have you used to facilitate this coordination?</li> <li>• What benefits have you observed through this coordination and collaboration?</li> <li>• Are there areas where your [agency/foundation] wants to develop more coordination and collaboration with other agencies and foundations? If so, please describe.</li> <li>• What are the barriers to coordinating and collaborating with other agencies/ foundations?</li> </ul>
11. To what extent does your [agency/foundation] encourage the TA center(s)/program(s) you fund to coordinate supports for developing and using linked data and integrated data systems with other TA centers/programs?	<ul style="list-style-type: none"> <li>• Can you provide an example?</li> <li>• What are the benefits of such coordination?</li> </ul>
<b>Wrap Up (appx. 5 mins.)</b>	
12. Is there anything else you would like to discuss that we have not covered but is important for the study to capture about your agency/foundation or the TA center/organization that you oversee/fund as it relates to data linkage and integration?	