Instrument 4. Site visit scheduling template

Instructions for DDDRP Assessment Team

What is this? A tool to finalize the itinerary for the site visits.

Who uses this? Site visit points of contact (POC)s will use this tool to schedule the interviews and focus groups for the site visits. DDDRP site visitors will customize it prior to sending to their site POCs.

When do I use it? Prepare this tool (tailor it to the grant recipient) to the extent possible before you have the initial planning conversation with the grant recipient's project director and site visit POC. At the end of that call, share your screen to walk through the document together and give them an overview of what we are asking. Following the call, finish tailoring the tool to the grant recipient using your notes on exactly what subrecipients you will visit, what staff you will interview, and then email the completed tool to the site visit POC.

How do I finalize the tool?

1. Save this template document as a copy in your site visit folder under a new name, e.g., "Arizona Initial Site Visit Scheduler."

2. Look for yellow highlights in the document below. Replace the highlighted text with text specific to your grant recipient to the extent possible.

3. Hold the initial planning conversation with the grant recipient's project director and site visit POC. At the end of the call, share your screen to walk through the document together.

4. Review your notes from this call with your site visit partner and decide on 2-3 timeslots that work best for the visit. Hold these dates on your calendars.

5. Determine when you need to have the site visit dates finalized and travel booked far enough in advance to be cost-effective. We recommend getting the dates and travel finalized at least 3 weeks in advance.

6. Look at potential flights to the site for those dates to see what might make the most sense so you can note it for the POC. (For example, if there are nonstop flights from Phoenix to DC but not from Tucson to DC, we may want to fly into Phoenix. Or if the only return flights are at 9pm, we may say we cannot schedule anything after 5pm on the last day.) Feel free to contact Allison with questions.

7. Look for remaining yellow highlights in the document below. Fill in each highlighted section with the appropriate information for the grant recipient, based on the conversation you had, and remove the highlight.

8. Complete the first four <u>columns</u> in Exhibit 2 using your notes from the initial planning call. You should **only include the subrecipients that the assessment would like to visit**, not the entire list of subrecipients. If you are missing any information in those columns (for example, a potential interviewee at a subrecipient organization), flag this for the POC and ask them to fill it in.

9. Delete this coversheet and save as the final file before sending to the POC.

10. Give the POC one week to complete this document. Contact them two days before it is due to check on their progress. Save the completed version in your project folder.

11. Don't forget to update the site visit tracker to document your progress in scheduling!

Instructions for Site Visit Point of Contact

Who is this for? Grant recipient site visit point of contact (POC) and any other site visit supports you designate. **What is this?** A tool to collect the information you, the grant recipient site visit POC, needs to schedule interviews and focus groups for the DDDRP assessment's site visit. **When do I use it?** Use this tool *after* the initial planning conversation between the assessment team and the grant recipient.

What is the DDDRP site visit?

As part of the DDDRP Assessment, two members of the assessment team (the site visit team) will visit each grant recipient and some of their subrecipient organizations to gain valuable information about implementation of [grant recipient's] Diaper Distribution Pilot program, and experiences of caregivers who receive diapers through this program. We include specific information for the [grant recipient] site visit below in exhibit 1.

Exhibit 1. What information do you need to know about the site visit?	
When is the site visit?	[Assessment team will tailor this to each grant recipient. The team will provide 2 or even three timeslots for the visit. Example: "We can visit October 15-18, November 1-3, or November 2-4. We expect to need 3 days on site to collect all of our data."]
Who's coming?	[Assessment team will provide the names of assessment team members, their role, their email, and their phone number. Example: "Allison Hyra, Assessment Project Director, ahyra@insightpolicyresearch.com, xxx-xxx-xxxx, and Sarah Giordano, Research Analyst, sgiordano@insightpolicyresearch.com, xxx-xxx-xxxx"]
What is the site visit team doing?	The site visit team will hold: • Two focus groups with caregivers who have received diapers through your program. Focus groups will occur with caregivers served by the following organizations: [add subrecipients agreed upon in initial planning call] • Three interviews with grant recipient staff: [Note the staff that we agreed upon in the initial planning call, specifying their name and their role. Example: "John Doe – Project Director, Sally Jones – Program Coordinator, Dana Lee – Data Lead].[If these staff are in similar positions/roles, for example two of them coordinate subrecipient activities, please note that we could interview them at the same time if that makes scheduling easier. If staff are in different roles, for example, if one is a project director and one is a data lead, please note that we will want to interview these staff

	separately.] • [X#] of interviews with subrecipient staff: o [add bulleted list of subrecipients along with the staff member we plan to interview and their role on the program. Example: "USA Diaper Bank – Jane Smith, diaper purchaser"] • An optional community tour • An optional observation of program activity (such as the monthly distribution of diapers at the agency)
Where is the site visit team going?	[Assessment team will add bulleted list all cities we expect to visit and note where we will hold focus groups. Example: • "Phoenix to hold 2 interviews and one focus group with Wildfire AZ • Mesa to hold 1 interview with MESACAN • Tucson to hold 1 interview with SEACAP, 1 interview with WACOG and 1 focus group with WACOG • Sierra Vista to interview NACOG."]
How long are the interviews?	90 minutes for the grant recipient director, 60 minutes for all other grant recipient and subrecipient staff
Where is the site visit team going to hold the focus groups?	The assessment team and [grant recipient project director] agreed we should hold the focus groups in [up to two cities with the two subrecipients, specify if both will be held in the same city. Example: "In Tucson with USA Diaper Bank's diaper program participants and in Phoenix with USA Community Action's diaper program participants]. We need your help to identify a focus group logistic coordinator at each of these subrecipients who can find a space to hold these focus groups; and determine the best day and time to hold these focus groups.
How long are the focus groups?	90 minutes each, but we will need the space for two hours to account for set up and breakdown.
What else do I need to know?	[Assessment team will list any other logistic information, like the order of locations for the visit. Example: "It makes most sense for us to fly into Tucson and then fly back out of Phoenix. So, we will want to visit subrecipients around Tucson and hold the Tucson focus group on day 1, and then visit subrecipients around Phoenix, interview grant recipient staff, and hold the Phoenix focus group on day 2 and 3. We will have a rental car and be responsible for our own transportation."]

What's your role?

Because you, the site visit POC, have existing relationships with relevant staff members across your subrecipient organizations, we request your help to schedule the site visits, including the interviews and the focus groups. Right now, we are asking you to:

1. Decide who will serve as the focus group logistic coordinators and work with them to suggest the best day and time for the two focus groups during that visit, and where (what building, what room) we could hold the focus groups;
2. Determine when staff are available for interviews;
3. Decide what times, out of the dates we have shared above, work best for the site visit;
4. Determine whether there are any events we could observe – such as the monthly in-person distribution of diapers or a diaper program outreach activity – during those dates.

Exhibit 2 includes an overview of this process and when we are asking you to complete each step, for your reference.

Exhibit 2. Timeline of site visit scheduling

	Date	Responsibility of	Tools to use
Reach out to focus group logistic coordinators & get information on best date, time, and location for focus groups	[Site visit team add date to complete this by]	Site visit POC	Example outreach email in exhibit 3
Reach out to all interviewees	[Site visit team add date to complete this by]	Site visit POC	Example outreach email in exhibit 5
Remind all interviewees, as needed, and fill out initial availability tracker	[Site visit team add date to complete this by]	Site visit POC	Example tracker in exhibit 4
Send site visit team an email with the best dates for site visit	[Site visit team add date to complete this by]	Site visit POC	None
Site visit team responds to confirm date	[Site visit team add date to complete this by]	Assessment site visit team	None
Complete the final site visit scheduling document & send to the site visit team	[Site visit team add date to complete this by]	Site visit POC	Final site visit scheduling document in exhibit 6
Schedule call with site visit POC and focus group logistic coordinators to discuss focus group recruitment	[Site visit team add date to complete this by]	Assessment site visit team	None
Send final invitations & additional information to all interviewees	[Site visit team add date to complete this by]	Assessment site visit team	None
Recruit focus group participants	[Site visit team add date to complete this by]	Focus group logistic coordinators	None

How do you do all of this?

The tools below will help you determine staff availability and make a recommendation on when the site visit should be; and then put together a final schedule for the site visit.

A. Figuring out availability

The tools below help you determine when the focus groups could be held, when all the interviewees are available, and what times work best overall for the site visit. **We are asking you to prioritize determining the best times for the focus groups above all other items.** We know the caregivers you serve have limited time and may only be able to participate in focus groups at certain times or on certain days of the week. We are prioritizing hearing from these caregivers at the time that will work best for them. We will schedule all other activities (such as interviews) around the caregiver focus groups.

1. Focus Group Availability and Coordination

First, you will need to reach out to the [subrecipients where focus groups will be held, specify which two, and specify the people if the grant director identified them] to **determine who from their staff can lead the focus group scheduling**. These people, the focus group logistic coordinators, will need to:

- Determine which day and time their focus group will be held;
- Identify locations that about 14 people can have a private conversation in for 2 hours total;
- Recruit current [program name] clients willing to participate in a 90 minute focus group;
- Help our site visit team address focus group participants' participation needs (e.g., help us identify a child care provider); and
- Be on site during the focus group as a support if needed (e.g., if a participant has a program question).

These focus group logistic coordinators will not be leading the focus group conversation; they will be coordinating all logistics.

Exhibit 3 is a template for an email you can use to reach out to potential focus group logistic coordinators. This template is intended to make it easier for you to reach out to subrecipient focus group logistic coordinators – if it does not work for you, feel free to edit it, write your own email, or conduct outreach by phone or in person. Once you have identified two focus group logistic coordinators and reached out to them, your site visit team will schedule a call with you and the focus group logistic coordinators to further discuss focus group recruitment and what focus groups will look like. If you reach out by phone or in person, please be sure to also contact your site visit team to share the contact information for the focus group logistic coordinators so we can schedule a call with them to discuss focus group recruitment in more depth.

Exhibit 3. Email template to potential focus group logistic coordinators
From: [POC] To: Potential focus group logistic coordinator CC: [assessment team will add emails of each site visitor], [grant recipient director], [subrecipient director – if different from suggested coordinator] diapereval@westat.com,

Subject: Diaper Distribution Pilot assessment focus groups with caregivers

Dear [Potential focus group logistic coordinator],

The Diaper Distribution Pilot assessment team is conducting site visits to our grant and subrecipients to learn more about how we do our work and how [program name] participants experience our program. The DDDRP assessment is being conducted by a team of researchers from Westat, Westat Insight, and Public Profit. Two of their team members – [assessment team will add team member names] – will be visiting [subrecipient organization] as part of this assessment and need to hold a focus group with clients who have received diapers from you through [diaper program name].

The site visit team needs help determining the best day and time for the focus group, selecting the best location (e.g., room, building) to hold the focus group, and recruiting participants for this focus group. I would like you to be the coordinator for this focus group from [subrecipient organization] and to help them with these focus group logistics and recruitment.

I had initial conversations with the assessment team to determine the best dates for their visit and we determined their site visit will be [assessment team will add date range(s). Example: "either October 15-18, November 1-3, or November 2-4].

- What days and times during those time slots do you think would work best for the caregivers that you serve to participate in a focus group?
- Where would you suggest we hold the focus group during those times? We will need a location that caregivers can easily access, where 14 people can have a private conversation for about 2 hours total.
- What gift card would work best for participating caregivers (for example, a gift card to Walmart, Kroger, Amazon). Each caregiver will receive a $50 gift card if they participate in the focus group.

The site visit team, copied here, would also like to schedule a call with you to share more information on the focus groups and materials you can use to recruit participants (such as a sign-up sheet and flyer). Please note your availability for a 60-minute call at this poll: [assessment team add a doodle poll with site visit team availability].

It's important that we set up this call and start recruiting caregivers as soon as possible, so please respond to this email by [assessment team will add date] so the site visit team can meet with you. If you have any questions, feel free to send them to the site visit team, who are copied on this email.

Thank you,
[Site visit POC]

2. Interviewee Availability

Once you have determined who will be the focus group logistic coordinators and decided on the best dates and times for the focus groups, you will need to reach out to all the interviewees to understand their availability. Exhibit 4 lists all the staff that the assessment team and the grant project director agreed we should interview and the two focus groups. First, fill out this table with the best dates for the focus groups (as shown in the first example row). You can then use this table as a template to track when staff are available, how far they are from your location, and any other notes you may have. If someone is not available for interviews, please identify an alternate interviewee and check for their availability as well. We have included an example of this in the second row for your reference. This template is intended to make it easier for you to track all the necessary information – if it does not work for you, feel free to edit it or create your own tracking system.

Exhibit 4. Outreach to potential interviewees (Assessment team will add date range)

Organization *(Assessment team fills out **entire column** based on notes from initial call)*	Name *(Assessment team fills out **entire column** based on notes from initial call)*	Role *(Assessment team fills out **entire column** based on notes from initial call)*	Priority *(Assessment team fills out **entire column** based on notes from initial call)*	Address of office and rough location in state	Dates and times available	Notes
Tucson Community Action	*[Please add focus group logistic coordinator name]*	*e.g., project director*	*Top priority*	*e.g., best location for the focus group is Tucson Community Action headquarter, 5678 Mill St., Tucson, AZ. They have a meeting room that fits 20 people that they can reserve for the focus group.*	*e.g., October 11 from 12-2pm, November 3 from 12-2pm. This is when caregivers normally come in to pickup diapers, so they often have this time held*	*e.g., We will need to arrange childcare for during the focus groups. The room is big enough that kids could accompany caregivers and have other activities (like drawing) in the back of the room, or we have another room across the hall where children and a childcare provider could be during the focus group.*
USA Diaper Bank	*Jane Doe*	*e.g., Case manager*	*e.g., "Must interview" or "can swap for any case*	*e.g., 1234 Lake Dr., 2-hour drive from Phoenix, in*	*e.g., October 15th at 10am or 1pm,*	*e.g., "Jane isn't available during any of the potential dates. I'd*

			manager on the project"	*South East Arizona towards Tucson*	*November 3rd any time, November 4th at 3pm or 4pm*	*suggest you interview Jonathan Smith, another case manager, instead. He's available on October 3 at 3pm."*

In exhibit 4, we have drafted a template email you can use to collect potential interviewees' availability for interviews. This template is intended to make it easier for you to reach out to interviewees – if it does not work for you, feel free to edit it, write your own email, or conduct outreach by phone or in person. We recommend you collect all potential interviewee's availability, document it in Exhibit 4 (or whatever tracking tool you would like to use), and then use that information to slot people into a final site visit schedule (exhibit 6).

Exhibit 5. Email template for interview outreach
From: POC To: Potential Interviewee CC: [Assessment team will add emails of each site visitor], diapereval@westat.com Subject: Availability for an in-person interview with the DDDRP assessment team Dear [Potential interviewee], Thank you for all your hard work to implement the [name of your diaper program]. Our funder, the Administration for Children and Families, has also funded an assessment of all the DDDRP grant recipient programs so they can understand how we do our work and what experiences our clients have with our program, and identify promising strategies to continue to support families' needs for diapers. The DDDRP assessment is an important opportunity for us all to learn from the work being done with DDDRP across the country. The DDDRP assessment is being conducted by a team of researchers from Westat, Westat Insight, and Public Profit. As part of this research, assessment team members will be visiting [insert state]and need to interview several staff members and leaders at subrecipient organizations. These interviews will cover topics such as your organization's role in the [assessment team will add local program name], your strategies for distributing diapers, and your perspectives on how the [local program name] is being implemented and the ways it may be helping the caregivers who receive diapers. I had initial conversations with the assessment team to determine the best dates for their visit and we determined their site visit will be [assessment team will add date range(s). Example: "either October 15-18, November 1-3, or November 2-4]. They will visit [subrecipient location, e.g., "Tucson"] to have an in-person interview with you [assessment team will either add "during this site visit" or with

specific days, if it matters for travel. Example "on either October 16, November 3, or November 4, based on which site visit dates work best and your availability."] Please respond with several times that you would be available for a [90 minute for grant recipient director, 60 minutes for all other staff] interview during these days.

Please also share the following:

- A potential location for the meeting, such as the address for your office or an alternate quiet location you can use for the interview.
- The best phone number for you, so the assessment team can contact you on the day of the interview as necessary.
- Any accessibility information the team should know, such as needing an ASL interpreter for the interview.
- Any other logistic information the assessment team should know before visiting you, such as a code needed to get into the building, parking information, directions to your office within the building, whether masks are encouraged or required, etc.

Once we determine a time for the interview, the assessment team (cc'ed here) will send you a calendar invite and also send you a bit more information about the interview process, the interview topics, and the interview consent language for you to review in advance.

These site visits are time sensitive, so please respond with potential times and locations for the interviews [and potential times and locations for the focus group, if applicable] by [assessment team will add date]. If you have any questions, feel free to send them to the assessment team, who are copied on this email.

Thank you,
[POC]

3. Determine which site visit dates work best

After you reach out to the focus group logistic coordinators and determine best times for the focus groups and hear back from the interviewees, **please make a recommendation of which dates for the site visit works best.** Scheduling the focus groups should be the priority – we can always reschedule interviews or conduct them at a later date virtually, as needed. The options are:

- [Assessment team will add date choice 1]
- [Assessment team will add date choice 2]
- [Assessment team will add date choice 3]

Please email this recommendation to the site visit team by [assessment team will add date]. Please include any specific reasons that you picked those dates (e.g., rooms for the focus groups are only available during those dates, the grant director is only available during those dates). The site visit team will reply within 48 hours to confirm this date. Once the site visit team confirms, you can continue to schedule the site visit.

B. Finalizing the site visit schedule

Once you recommend final dates for the site visit and the site visit team confirms, you will put together a schedule for the site visit based on interviewee availability and focus group times. Exhibit 6 is a template you should use to schedule the site visit. We included the first three rows as examples. When putting together the schedule, please consider travel time from one location to another, short breaks between activities, and meals. (For example, please don't schedule two interviews back-to-back if we need to travel 30 minutes to get to the next interview.) **Please save this schedule and send it to the site visit team by email by [assessment team will add date].**

As part of the schedule, please consider whether there are any other events we could observe during these dates – such as the monthly in-person distribution of diapers or a diaper program outreach activity. The assessment team is conducting these site visits to better understand the way you run your diaper program, and these type of events will help us get a picture of what your work looks like.

Exhibit 6. Site Visit Schedule					
[Date]					
Time	**Activity**	**Exact location for meeting**	**Email**	**Phone number for day-of contact**	**Accessibility and Engagement Needs *(e.g., Spanish, ASL interpreter)* and other notes**
e.g., 9:00-10:30am	*e.g., Interview with Sally Lopez, MPH, director of DDDRP program at Milwaukee Diaper Bank*	*e.g., 1234 Lake Street, Unit 4, Milwaukee, WI XXXXX.*	*e.g., slopez@milwaukeediaper.com*	*e.g., (999)999-9999*	*Confirmed. Text upon arrival for code at the front door. Can park in parking garage. Masks encouraged but not required.*
e.g., 10:30-11:00am	*Travel to Milwaukee Diaper Connection*	*e.g., 5678 Lake Street, Wauwatosa, WI, XXXXX.*	*Not applicable*	*Not applicable*	*Milwaukee Diaper Connection is about 15 minutes away. We've built in a little extra time so you can set up before the interview at 11.*
e.g., 11:00-12:30	*e.g., Focus group with Milwaukee Diaper Connection*	*e.g., 5678 Lake Street, Wauwatosa, WI, XXXXX*	*e.g., Focus group logistic coordinator is jdoe@milwaukedaiperconnection.com*	*e.g.,(999) 999-9999*	*Many of our caregivers speak Spanish. We may want to hold a Spanish-speaking focus group and get an interpreter.*
[Date]					
Time	**Activity**	**Exact location for meeting**	**Email**	**Phone number for day-of contact**	**Notes**

[Date]					
Time	**Activity**	**Exact location for meeting**	**Email**	**Phone number for day-of contact**	**Confirmation status & notes**
[Date]					
Time	**Activity**	**Exact location for meeting**	**Email**	**Phone number for day-of contact**	**Confirmation status & notes**

What’s next?

Once you email the focus group logistic coordinators, your site visit team will send a meeting invitation for those coordinators, you, and the site visit team to discuss the focus groups in more depth. In that meeting, we will discuss how to recruit focus group participants; what types of participants we are looking for; and any accommodations we may need to make for the focus groups based on the populations you serve (such as holding a Spanish-speaking focus group).

Once you email the final schedule (exhibit 5) to your site visit team, the site visit team will send meeting invitations to each interviewee and will follow up directly with all them to introduce ourselves, share a bit more about the interview topics, and ensure they have relevant consent forms and contact information. We will keep you copied on these emails for your reference. The site visit team will also book their flights and will share this information with you.

Thank you for your assistance in scheduling these site visits – we would not be able to do this without your support.

[Site visit team members names and emails]