

# Supporting Family Economic Well-Being through Home Visiting (HomeEc)

## PROGRAM RECRUITMENT SCRIPT AND ELIGIBILITY SCREENER

The HomeEc team will use this guide to:

- Provide information to interested programs about HomeEc's formative evaluation and planned activities
- Answer questions the program may have about the study
- Learn about the home visiting program's research protocols
- Gather information to inform the site selection process, including determining if the home visiting program meets the criteria to be in the study and is interested in participating
- Establish a point of contact to coordinate activities if the program is selected to participate

### A. Introduction

Thank you for taking the time to speak with us today. My name is [NAME], and my colleague is [NAME]. We are from [ORGANIZATION(S)]. We are here to talk about your program's potential participation in the Supporting Family Economic Well-Being through Home Visiting project, also known as the HomeEc project. Thank you again for expressing interest in our formative evaluation on supporting families' economic well-being. We are looking forward to learning more about your program in today's call.

During today's call, I will take some time to describe the HomeEc project and our formative evaluation and ask you some questions about your home visiting program. I'll also save some time during the call for you to ask questions about the evaluation. Our conversation should take about an hour. After the call, we will take some time to consider your organization's fit for the evaluation while you consider whether it is the right fit for your program. I will also send you a handout of information on the formative evaluation, including details on the project's timeline and data collection, so you can refer back to the information we discuss today after the call.

*INTERVIEWER NOTE: Tailor this guide before the meeting based on responses to the call for information. If known, check whether the early childhood home visiting model used by the program is eligible for MIECHV funding, which you can find out at <https://homvee.acf.hhs.gov/HRSA-Models-Eligible-MIECHV-Grantees>, and tailor question 2 accordingly.*

## B. Description of the HomeEc formative evaluation

First, I want to give you some basic information about the HomeEc project. The Administration for Children and Families in the U.S. Department of Health and Human Services is overseeing this study in collaboration with the Health Resources and Services Administration. The study is designed to better understand, measure, and support the economic well-being of families enrolled in home visiting programs.

HomeEc is planning to conduct a kind of study called a rapid-cycle formative evaluation to test practices that home visiting programs could use to support a family's well-being. Formative evaluations help programs make existing practices stronger or develop new practices, test them within a short time period, collect information on how they are working, and refine and re-test them in a cycle of improvement. This formative evaluation is designed to test practices like goal setting, community referrals to provide economic well-being services, and financial education, including budgeting. The goal is to strengthen how home visiting programs address families' economic well-being.

If your program is selected, your program and staff will work closely with our project team members. We will start by learning about your program context, whether and how your program currently addresses family economic well-being, and where there might be opportunities to improve your program's practices. We will do this by having small-group interviews with your staff, any relevant partners, and current or former program participants. Together, we will decide what your program wants to address about family economic well-being and choose a practice to pilot test.

Next, we will work together to design the practice, associated materials, and training. Or, if you have an existing practice that addresses family economic well-being, we might choose to refine that practice during this phase of the project. We will hold a series of regular meetings with a core group of your staff, and have strategic planning meetings to get input from a wider group of staff and possibly partners, if you have them.

After we design the practice, our team will provide tailored training to a group of staff selected to test the practice, and will work closely with them to see how it goes. We'll see what your staff thinks of the practice and whether we need to make changes. During testing, we may interview the staff involved and ask caregiver participants and staff to take a short survey about their experience with the practice. If we do this, we will need your help selecting participants, coordinating calendars, and doing other things that help us learn how the practice is working. The experiences, practices, and wisdom of your program staff and families will help us decide how to refine the practices and possibly do additional test(s).

The formative evaluation will take place over the course of about **one year, starting in fall 2024**. The expected time commitment for staff will vary depending on their role in the organization. To participate in the study, we expect up to three core program staff to be in at least two calls per month for about a year, plus do some independent work. Direct service staff will be expected to participate in informal interviews and a series of strategic planning

meetings, execute the new strategies, and participate in data collection during the pilot. If there is a partner agency you want to involve in this work, we would also invite them to be part of the pilot.

*[If call participants ask for more information, say that data collection may include:*

- Interviews with program directors, supervisors, direct service staff, partner staff, and/or caregivers to learn about programs and identify the focus of the practice
- Up to six strategic planning meetings including program directors, supervisors, and direct service staff over the course of a year
- Interviews during learning cycles with program directors, supervisors, and staff
- Surveys for caregivers and direct service staff during learning cycles]

We realize that we are asking a lot from programs and your staff and appreciate the time and effort you will put into participating in the evaluation. HomeEc is a unique opportunity for home visiting programs to participate in an innovative and collaborative process to design and try new practices to support families' economic well-being. Program staff will receive hands-on training and technical assistance throughout the project. Also, if your program is selected, we will provide your program with \$2,300 to acknowledge your contributions to the study and your participation in study activities. We will also set up a memorandum of understanding (or MOU) with your organization that will clearly outline all study expectations and a payment schedule.

### **Do you have any questions about the formative evaluation?**

HomeEc is looking for programs willing and excited to be part of this formative evaluation. Now that you have a basic understanding of the evaluation, **do you think your program might be interested in participating?** (Probe if not: Do you need to speak to anyone else at your program before answering this question?)

[If program is interested] Great! We'd now like to ask you some questions to get to know your home visiting program better. We would like to record the rest of our conversation so we do not miss anything you tell us. Only the evaluation team will listen to the recording, and we will destroy the recording at the end of the project. Do we have your permission to record this call? **[If yes, press record. If no, take written notes only.]**

[If program is not interested, end call] We understand. Thank you for your time today.

## **C. Site selection criteria**

1. Does your program receive funding from state/territory Maternal, Infant, and Early Childhood Home Visiting (MIECHV) program or Tribal MIECHV?
2. Can you confirm your program uses [EARLY CHILDHOOD HOME VISITING MODEL]?
  - a. [If model is unknown] Which early childhood home visiting model does your program operate?

- b. [If model is not eligible for MIECHV funding] What are the program's goals? What outcomes do you expect for families? How often do you make home visits? What are the characteristics (qualifications, background, gender, race, etc.) of staff who provide home visits?
3. What geographic area do you serve? How would you describe the area? (Probe: Is it primarily rural or urban?)
4. Can you describe the population your program primarily serves, such as their race or ethnicity, socioeconomic status, family size and structure, or immigration status?
5. About how many home visitors are employed at your program?
  - a. How many are full-time employees?
  - b. How many are part-time employees?
  - c. How many families are typically on a home visitor's caseload?
6. Does your program have a mechanism to engage with current or former participants, such as a participant advisory board, community advisory board, or council? Please describe.
7. What services does your home visiting program provide to families to support their economic well-being? (Probes: financial literacy workshops, budget counseling, case management or community referrals, direct financial or material assistance, goal-setting or economic coaching, or job assistance).

[If services are named:]

  - d. Please describe the services.
  - e. Does your program have specialized staff who provide support or services to families to help them achieve economic well-being? What are their titles?
8. Does your program collaborate with community partners to provide supports and services to improve families' economic well-being? Who are the partners? What services do they provide?
  - a. If you don't have existing partnerships in place, have you identified potential organization(s) in the community that you want to develop a partnership with to provide economic well-being services?
9. Why was your program interested in responding to the call for information?
  - a. Our project defines family economic well-being as including a family's ability to meet basic needs, have financial security, have control over financial decisions, and have secure and satisfactory employment. Which of these four components might your program be interested in addressing?
  - b. Which, if any, practices listed on the call for information (if any) might your program be interested in piloting? Or, is there a practice that wasn't listed in the call for information that you might be interested in piloting?

- i. Providing budgeting support to participants using a new or existing standard budgeting tool
  - ii. Asking questions about economic circumstances on existing intake forms in a strengths-based way to build rapport between the home visitor and the participant
  - iii. Building or strengthening partnerships to address family economic well-being—for example, creating a referral partnership for community economic supports
  - iv. Providing a short lesson or handout about a financial education topic, such as how to establish credit or open a bank account
  - v. Coaching participants on how to set and pursue meaningful economic goals, such as saving for a car, seeking employment, or obtaining an educational degree
  - vi. Training staff to improve their understanding of (1) family economic well-being, (2) the relationships between family economic well-being and home visiting priorities, and/or (3) delivering services using a strengths-based model
10. Mathematica and its partners follow the research protocols for this project that were approved by the study funder, the Administration for Children and Families, the Office of Management and Budget, and an Institutional review board (IRB). Does your program have its own IRB or tribal research council requirements we need to know about?
11. Do you think your program will need approval from any other agencies (for example, from a state agency) if you are chosen to participate in the evaluation?
12. We'd like to coordinate evaluation activities through one main contact person at your home visiting organization. Whom should we reach out to after this call?

#### **D. Next steps**

Thank you for talking to us. We will send you a handout of information on the formative evaluation that you can refer to shortly after our call. The HomeEc team, in partnership with the Administration for Children and Families and the Health Resources and Services Administration, will consider the answers you gave during today's call and will email you with our decision about moving forward with your program's participation in the formative evaluation. Please take some time to consider whether your program would like to participate in the formative evaluation, if selected to move forward.

#### **Do you have any other questions for us?**

If you think of any questions or concerns, please feel free to contact me at [PHONE or EMAIL ADDRESS]. Thanks again for your time today!