INSTRUMENT 4: INTERVIEW GUIDE FOR MOBILITY SERVICE PROVIDERS
Evaluation of the Community Choice Demonstration

CONSENT

Before we begin, I want to tell you a few things about this study and your participation in it. If you would like translated materials, or to complete the survey in language other than English, please let us know and we will try to accommodate you. If you need information to be presented in an accessible format, for example, Braille, audio, large type, or sign language interpreters, or need a reasonable accommodation (a change or adjustment) so that you can participate, please let us know. Please feel free to ask me any questions you might have. We will also [email/give] you a copy of this information.

The U.S. Department of Housing and Urban Development (HUD) hired a research team to conduct a study on HUD's Community Choice Demonstration (Demonstration) program. The research team is led by Abt Associates and includes the Urban Institute, MEF Associates, Sage Computing, Social Policy Research Associates, a team of consultants, and other researchers that may be added in the future. The research team and HUD want to determine whether and to what extent mobility-related services are effective in helping Housing Choice Voucher (HCV) holders move to opportunity neighborhoods. During this interview, we will ask you questions about the Demonstration, including questions about your role and [MOBILITY SERVICE PROVIDER's] involvement in providing mobility services as part of the Demonstration, your perspective on the Demonstration, and how well the Demonstration meets the needs of participating families.

We are not evaluating your agency or its services. As part of this process, we are talking with other mobility service providers, as well as with representatives from PHAs, participating in the Demonstration. We will be conducting at least two rounds of interviews and, we may reach out to you again in a couple of years for an additional interview.

I am required to tell you that the questions in this survey have been reviewed by the Office of Management and Budget (OMB) under the Paperwork Reduction Act of 1995. This collection of information is voluntary and will be used to evaluate the US Department of Housing and Urban Development's Community Choice Demonstration. The information requested under this collection is fully protected and kept private to the extent possible by law, including 5 U.S.C. 552a (Privacy Act of 1974) and OMB Circular No. A-130.

Public reporting burden for this collection of information is estimated to average 90 minutes per response, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number. The OMB number and expiration date for this collection are OMB #: XXX-XXXX, Exp: XX/XX/XXXX. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to XX at XXXX@XXX., or by phone at XXX-XXX-XXXX.

During the interview, one of the researchers will be taking detailed notes, but we will not identify your name in our notes. With your permission, we will audio record the interview to have an

accurate record of what is said as a back up to our notes. We may contact you after the interview to ask for clarification. No one outside of the research team will listen to the audio recordings, see any information that identifies you personally, or review the notes we take. We will make every effort to protect your privacy to the extent permitted by law, but if we think you are at risk of physical or emotional harm, we may need to notify someone.

Themes across all the interviews we are conducting will be published in a report to HUD. When we write our reports and discuss our findings, the answers you provide during an interview will be combined with answers from many individuals. We never share any information that identifies you or any other respondents by name outside of our research team. However, we may identify the agency you work for, and unique roles could allow an individual to indirectly attribute a statement to you. We make every effort to avoid this, but you should be aware of the possibility.

Do you have any questions about the study or today's discussion? *[Pause for response and address any questions]*

Do you agree to participate? *[Pause for response]*

Are you comfortable with this interview being recorded? *[Pause for response]*

Thank you, we are going to turn on the audio recorder now.

The tape recorder is now on.

Do you have any questions before we continue?

OK, let's start.

Thank you for taking the time to talk with us today.

BACKGROUND [ALL RESPONDENTS]

First, we'd like to hear about your organization and the position you hold.

1. [*Contractor staff*] Please describe your organization.
    a. What are its main activities?
    b. Tell me about any experiences your organization had providing mobility-related services before launching the [MOBILITY PROGRAM]?

    Probes: Mobility services, housing navigators, services for voucher holder services?

2. What is your position?
    a. What department or division do you work in? What does that department/division do?
    b. Please describe your primary responsibilities at [PHA/ORGANIZATION NAME].
    c. How long have you been in this position?
    d. How did you come to work in this position? What were you doing before this?

3. Please describe your role and responsibilities with the [MOBILITY PROGRAM] specifically.

    a. About how much of your time do you spend on [MOBILITY PROGRAM]?

    b. About how much of that time do you spend working directly with [MOBILITY PROGRAM] families?

    c. About how much of your time do you spend engaging with landlords with housing units in opportunity areas?

    NOTE: *If respondent works* only *with families or landlords, skip sections as appropriate.*

4. How do you stay in communication with [the participating PHA(s)/other PHA teams if PHA staff] that administer the HCV/Section 8 vouchers?

    Probes: Mainly informal or ad hoc, case conferencing, standing meetings, is there a direct point of contact at the PHA?

    a. What do you generally talk with PHA staff about? Probes: individual families, training, questions on HCV policies, portability, rent amounts, inspections, engaging on behalf of families or landlords

SERVICE CAPACITY AND CONTEXT [STAFF DIRECTLY ENGAGED WITH FAMILIES]

5. How are families assigned to work with case managers?

    Probes: By family needs, new/existing voucher holders, case manager caseloads, language needs, age of kids, where a family is in its search and lease-up process?

6. How many families do you personally work with at any given time? Is your caseload typical of the caseloads of other staff working on [MOBILITY PROGRAM]?

    a. Is it challenging to manage the workload? How?

7. Do families work with multiple staff or [coaches/case managers] during their time in [MOBILITY PROGRAM] or are they assigned to a particular case manager the whole time?

    a. [*If families work with multiple staff*] Are there particular hand-off or collaboration points when families engage with different case managers or staff? [I*f so*] What are these points? Can you tell me more about that?

FACTORS AFFECTING OPPORTUNITY MOVES [STAFF DIRECTLY ENGAGED WITH FAMILIES]

Let's talk about the factors and challenges that might affect whether families search for housing in opportunity neighborhoods or move to opportunity neighborhoods.

8. What are some of the things that affect families' interest or willingness to search for housing in an opportunity area?

   Probe: Connections to baseline neighborhood; familiarity with opportunity areas; racial composition of opportunity areas; perception of landlords' willingness to accept vouchers; financial concerns about paying a security deposit; type or quality of housing; neighborhood safety; access to preferred schools, doctors, stores, family, childcare, work, other services or supports; children's preferences? *If not provided, ask for specific example(s).*

   a. Do the factors influencing a family's willingness to search for housing in an opportunity area differ for new admission families compared with existing voucher holders? [*If so*] How do they differ?

   b. Have you noticed any patterns based on family characteristics that make it challenging for certain types of families to search for or move to housing in an opportunity area?

   Probes: rental or credit background; larger families, or families with older children; language; race/ethnicity of voucher families

9. What factors affect whether families actually move to an opportunity area?

   Probe: Connections to baseline neighborhood; familiarity with opportunity areas; racial composition of opportunity areas; a perception that landlords may be unwilling to accept vouchers; financial concerns about security deposits; credit issues; type or quality of housing; neighborhood safety; access to preferred schools, doctors, stores, family, childcare, work, other services or supports; children's preferences? If not provided, ask for specific example(s).

   a. Do these factors differ at all for new admission families versus existing voucher holders?

   b. What about other family characteristics? Are there families that have unique challenges searching for housing or moving to an opportunity area?

   Probes: Rental or credit background; larger families, or families with older children; language; race/ethnicity of voucher families?

10. In your experience with [MOBILITY PROGRAM] participants, do they tend to have an apartment/house in mind for their move at the point they enter the program? Tell me more about that.

    a. Do they tend to have a particular neighborhood in mind? Tell me more about that.

    b. [*If voucher families do tend to have specific ideas in mind*] Does this differ between new admission families and existing voucher families?

    c. [*If voucher families do tend to have specific ideas in mind]* Do they tend to prioritize housing or neighborhood preferences?

11. How difficult is it for the families you work with to find units in opportunity areas that they can afford with their voucher?

    a. What are the key barriers or challenges families experience when searching for housing?

    Probes: Knowledge of opportunity areas; time available to search; transportation; search costs; landlord unwillingness to accept vouchers, payment standards do not meet costs in opportunity areas, need for large deposits or search costs?

    b. Are there certain opportunity neighborhoods in which families are more successful finding housing with their voucher than others? [*If so*] Why do you think that is?

    Probes: Low vacancy/availability of units, large number of rentals, availability of affordable single-family homes, more affordable units to choose from, SOI law, transportation access, landlord acceptance of vouchers?

MOBILITY-RELATED SERVICES [STAFF DIRECTLY ENGAGED WITH FAMILIES]

Now we would like to talk through your work with participating families over the course of their housing search and lease up process. We would like to learn more about your role in providing services to families, and what a typical engagement with a family is like from the point you first make contact with them, through their housing search and lease up, and after they move

12. Let's start with the point you first make contact with the families enrolled in the mobility program. How do you typically engage with families when they are first referred to you for [MOBILITY PROGRAM] services?

    a. How do you first make contact with families? Do you tend to encounter any challenges initially engaging them? Tell me about those challenges.

    b. About how long does it take to reach families after they first enroll in [MOBILITY PROGRAM] after you first contact them?

    c. Have they received their voucher at that point?

        i. [*If no*] What stage of the voucher process are they in when you first engage with them?

13. What happens next? How do you work with families at this initial stage of engagement with the program?

    a. What is the main focus of your work with families at this stage? Tell me more about that. What services are you providing or offering families?

    b. How frequently do you interact with families during this first stage?

    c. How much time do you spend with a typical family during this phase?

    d. Walk me through a typical meeting with a family at this first stage of engagement.

    e. What activities, if any, happen in a group setting?

f. What referrals, if any, do you make to outside service providers? How often do you make these referrals?

Probes: Individual coaching; map of family systems; identifying move goals; education about the program and opportunity areas; building motivation for HOA move; credit report review; application cover letter; Renter's Workshop; Housing Search Workshop?

14. What happens after that? How do you work with families once they are ready to start the housing search process?

    a. What services do you offer to support the housing search? Tell me about all the search services you might provide a family.
    Probes: Assistance identifying units, submitting applications, unit, or neighborhood tours?

    b. How frequently do you interact with families during the search stage?

    c. How much time do you spend with the typical family during this phase?

15. Tell me more about identifying available housing units. How do you help families find units in opportunity areas?

    a. What is an example of how you might help a family identify available units in opportunity areas?

    b. Do you provide families with rental listings for available units in the opportunity areas they are interested in? Can you tell me more about the listings?

16. At what point in the process of working with a family do you discuss whether they might need financial assistance? Does this come up at a specific time or at multiple times?

    a. What financial services or supports are available for families?

    Probes: Security deposit, pro-rated first month's rent, search costs, application fees, other search or move costs?

    b. How do you determine the level of financial support to provide different families?

    Probes: Coach discretionary fund, caps on assistance level, individual family need?

    c. What role do you play in administering this financial assistance? What does a typical process look like for how you would support families' receiving financial assistance?

    Probes: Discussion with families, with other case manager/service provider staff, internal agency guidance? Differences for new versus existing voucher holders; older or younger children; household size?

17. What happens next? How do you work with families during the lease-up process?

    a. What services or supports do you offer at this point? Tell me more about that.

    Probes: Expediting inspections, application support, financial assistance, coordinating with the PHA?

b. How frequently do you interact with families during lease up?

c. How much time do you typically spend with a family during this phase?

18. How much time do you typically interact with a landlord or property manager during the housing search and lease-up process? What do these interactions usually involve?

19. [*External Services Provider*] How much time do you typically spend with the PHA during lease-up? What do these engagements usually involve?
[*PHA Services Provider*] How much time do you typically spend with other PHA divisions during lease-up? What do these engagements usually involve?

20. What happens once a family has successfully leased up and moved into their new home?

    a. Can you give me an example of how you might engage with a family after they have moved during post-move check-ins?

    b. How frequently do you interact with families after their move?

21. In general, how do you typically interact or communicate with families (in person, by phone, by email, or by text)?

    a. Does this vary over the course of your work with a family? Or across families?

    b. Does this vary for new versus existing voucher families? How so?

    c. On average, how challenging or easy is it to stay in contact with families during and after their move?

22. How do you determine which services to offer families to meet their individual needs? Tell me more about that.

    a. How do families decide which services to use?

    Probes: Discussion with families, with other case manager/service provider staff, internal agency guidance, family service plans?

EFFECTIVENESS OF COMPREHENSIVE MOBILITY RELATED SERVICES PROVIDED TO FAMILIES [STAFF DIRECTLY ENGAGED WITH FAMILIES]

We'd like to hear more about how effective the specific services you provide to families are in helping them move to opportunity neighborhoods. Let's walk through the services you mentioned.

23. Let's start with the initial, pre-search services you described providing when you first engage with a family. Which of these services do you think are effective or important for supporting families' moves to opportunity areas? Why?

    a. Are there services that are less effective?

        i. [*If yes]* Why? Are there services that you think would be more effective?

b. Which of the pre-move services you identified as effective are the most important to help families successfully search and lease up? Why?

24. What about housing search assistance? Which of these services do you think are effective or important to supporting moves to opportunity areas? Why?

    a. Are there services that are less effective?

        i. [*If yes]* Why? Are there services that you think would be more effective?

    b. What are the most important of the housing search services you provide? Why?

    Probes: Identifying available units, negotiating/mediating with landlords, coaching, information about opportunity areas?

25. What about financial assistance? How useful are these services for supporting moves to opportunity areas?

    a. What type of financial assistance is most important or effective?

    b. Are any types of financial assistance less important or effective in supporting moves to opportunity areas?

26. How important do you think post-move check-ins are to families' ability to remain in opportunity areas after their initial move?

    a. Can you provide an example?

27. Are there any additional services you think families might need to help them move to or stay in an opportunity neighborhood, that are not offered by [MOBILITY PROGRAM]?

    Probes: Ongoing counseling or coaching, PHA services, other social/economic supports, school choice, supports for children, post-move services if not currently available?

28. Tell me about what has been challenging about working with families to provide services?

    a. Tell me about what has gone well about working with families?

    Probes: Willingness to engage in services, relationship building, building, and maintaining motivation to find housing in an opportunity area, families' competing priorities in housing and other areas of life?

ENGAGEMENT WITH LANDLORDS [STAFF DIRECTLY ENGAGED WITH LANDLORDS]

Now I'd like to hear more about how [MOBILITY PROGRAM] engages with landlords. FULL STOP

(then include these as probes: either through direct outreach, or any services and incentives offered to landlords.)

29. What does landlord engagement typically entail? Can you describe an example of how you do landlord outreach or engagement?

    Probes: Informational materials, direct outreach to landlords of available units, education about the voucher and mobility program?

    a. Is there a dedicated person who addresses landlords' questions or concerns? [If so, who is that person?]
    b. Is outreach done on behalf of specific families, or for the program as a whole?
    c. On average, how responsive are landlords to your outreach efforts?
    d. What kind of questions or concerns do landlords have about the voucher program? About the mobility program?
    e. How effective is landlord outreach or engagement for supporting moves to opportunity areas?

    Probes: Identifying landlords with available units in opportunity areas, education about the HCV program and mobility program, advocating for individual families?

30. *[Check in advance whether expedited inspections are offered and ask only if relevant]* Please tell me about the process of providing expedited inspections for units occupied by mobility program participants in opportunity areas.

    a. Describe how the inspection timeline works.

       Probes: Coordination with PHA staff, ensuring inspections are timely?

    b. How important do you think expedited inspections are in encouraging landlords in opportunity areas to accept voucher holder families?
    c. What role do you have in expediting any of the other administrative processes for the voucher program, such as requests for tenancy approvals (RFTAs), lease-signing, or determining rent reasonableness? *If any role identified,* Can you tell me more about that role and your sense of its importance for landlords?

31. What, if any, financial incentives are available to landlords?

    Probes: Signing bonuses, holding fees, move-in fees, damage mitigation fund?

    a. How do landlords become aware of these incentives? When do you engage with landlords about these available incentives?
    b. How important do you think financial incentives for landlords are in encouraging landlords in opportunity areas to accept voucher holder families?
    c. Which financial incentives do you think are most important or effective? Does this vary by type of landlord?

32. Do you engage with landlords after a [MOBILITY PROGRAM] moves in? [*If so,* how? Can you give an example?

a. How frequently do you engage with landlords after lease up?

b. Are post-move check-ins with landlords important in helping clients maintain tenancy? How important?

c. Are post-move check-ins important for keeping landlords in the program? How important?

Probes: Conflicts with mobility program tenants, information about how the voucher works, mobility program versus PHA/HCV program roles after lease up, liaison with PHA/HCV staff, notification from landlords about additional units coming online?

33. Have you encountered any challenges in engaging with landlords during outreach, tenant leasing, or post move check-ins? Can you give a couple examples?

    a. What has gone well?

    b. What is missing from the program that would really make a difference for recruiting and retaining landlords in opportunity areas?

    Probes: Identifying landlords in opportunity areas, contacting/communicating with landlords, willingness to participate in the program, willingness to resolve issues with tenants?

34. How are the needs of landlords in opportunity areas different from landlords with units in traditional voucher neighborhoods in [PHA GEOGRAPHIC AREA]? Tell me more about that. Can you give an example?

35. Are there any services or incentives you offer that don't seem to be important to landlords? Which are these? Why do you think that is?

    a. What additional services, if any, do you think are needed and not currently offered to encourage landlords to rent to mobility program families?

    b. Do services offered vary by landlord characteristics or prior voucher involvement?

36. In general, what is your role in developing or mediating the relationship between families and landlords?

    Probes: During the search or lease up process? After lease up?

    a. What is your role in developing or mediating the relationship between landlords and the PHA/HCV staff?

    Probes: During the inspection and lease up? After lease up?

ADDITIONAL CONTEXT ON MOBILITY SERVICES [ALL RESPONDENTS]

37. Tell me about any changes in the services offered – or how they are offered – since [MOBILITY PROGRAM] launched?

    a. What brought these changes about?

38. Does your program offer any other services or supports to [MOBILITY PROGRAM] participants, families, or landlords, beyond the ones we have discussed already?

    a. [*If so*] What are these additional services?

    b. [*If so*] Who provides these services?

REFLECTIONS [ALL RESPONDENTS]

For the last couple of questions, I'd like to ask you to reflect overall on your experience with the [MOBILITY PROGRAM].

39. What do you think is working well with [MOBILITY PROGRAM] implementation so far?

40. What do you think could be done better to implement [MOBILITY PROGRAM], and support your work with families moving to opportunity areas or with landlords?

41. Is there anything that I did not ask about the mobility demonstration that is important for us to understand?

42. Do you have any final questions for me about the study, or about the research team?

Thank you for taking the time to talk with me today. We will now turn off the recorder.