Interview Guide for Mobility Services Providers

INSTRUCTIONS FOR INTERVIEWERS

This guide is intended for interviews with mobility services staff who work directly with program participants to provide Comprehensive Mobility-Related Services (CMRS), including coaches, leasing coordinators, and team leaders. Staff may be embedded in participating Public Housing Agencies (PHAs), or employees of service providers contracted by participating PHAs to provide mobility-related services. How to use probes and prompts: *Probes* should be used if the respondent's answer does not cover the topics listed in the probes. *Prompts* should be used when a respondent isn't sure how to answer a question or seems unsure about what the question is asking. If a respondent provides an answer to a question, whether or not they include mention of the items listed as prompts, then the interviewer should not use the prompts.

Informed Consent:

- *Prior to arriving for in-person interviews, print a copy of the appropriate consent form for each respondent.*
- *For interviews with the mobility services staff, please have them read the consent form themselves. Review the key points verbally with the staff after they have read the consent.*
- *Provide a copy of the consent form to the staff person for their records. For in-person interviews this should be a hard copy and for virtual interviews, this should be sent to them via email.*
- *The following instructions do not need to be read aloud to respondent but prior to the interview, this information should be shared as appropriate.*

If you would like translated materials, or to complete the interview in language other than English, please let us know and we will do our best 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.

CONSENT

Thank you for taking the time to speak with me today. I am <NAME>, a researcher at <ORGANIZATION>, and this is <NAME> from <ORGANIZATION>. Please feel free to ask me any questions you might have as I move through the introduction. We will also [email/give] you a copy of this information.

Before we begin, I want to tell you a few things about this study and your participation in it.

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 Global and other researchers, including the Urban Institute. The research team and HUD want to determine whether mobility-related services are effective in helping families with a Housing Choice Voucher (HCV) move to opportunity neighborhoods. During this interview, we will ask you questions about the Demonstration, including questions about your role and [MOBILITY SERVICES PROVIDER's] involvement in providing mobility-related services as part of the Demonstration, your perspective on the Demonstration, and how well the Demonstration meets the needs of participating families.

We hope that you will be candid in the information you provide about the program. We are not evaluating your agency or its services. As part of this study, we are talking with other mobility services providers, PHA staff, landlords, and families participating in the Demonstration. We estimate this interview will last about 90 minutes.

We will be conducting interviews again in the future and may reach out to you in future year.

During the interview, [NAME/I] will be taking detailed notes; we will not identify your name in our notes. With your permission, I/we will audio record the interview to have an accurate record of what is said as a back-up to our notes; we will not record any video. I/we may contact you after the interview to ask for clarification. No one outside the research team will be allowed to listen to the audio recordings or review the notes. Only the people doing the research will see any information that identifies you personally and we will destroy the recording, transcript, and notes at the conclusion of the project.

What we learn from all the interviews will be published in reports to HUD. When we write our reports and discuss 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.

The questions in this interview have been reviewed by the Office of Management and Budget (OMB) under the Paperwork Reduction Act of 1995. The information requested under this collection is fully protected and kept private to the extent possible according to the Privacy Act of 1974.

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 audio 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.

The Paperwork Reduction Act Statement: This collection of information is voluntary and will be used to evaluate the US Department of Housing and Urban Development's Community Choice Demonstration. 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 #: 2528-0337, Exp: 12/31/2026. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to Anna P. Guido at Anna.P.Guido@hud.gov or call at 202-402-5535.

BACKGROUND

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

[*If the mobility services provider entity has changed since the round 1 interviews, ask Q1 and sub-questions of the TEAM LEAD. If the mobility services provider entity has not changed, skip to Q2.*]

1. Please describe your organization.

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

   a. What are its main activities?

   b. Tell me about any experiences your organization had providing mobility-related services before launching the Community Choice Demonstration?

2. What is your position?

   a. How long have you been in this position?

2. Please describe your role and responsibilities with the Community Choice Demonstration specifically.

   a. About how much of your time do you spend on Community Choice Demonstration?

   b. About how much of that time do you spend working directly with PHA or HCV staff?

   c. About how much of that time do you spend working directly with Community Choice Demonstration families?

   d. 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.

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

   Prompts: Mainly informal or ad hoc, case conferencing, standing meetings,

   a. Is there a direct point of contact at the PHA?

      i. If [yes], who is the contact and what is their role?

   b. What do you generally talk about with PHA staff?

Prompts: individual families, training, questions on HCV policies, portability, rent amounts, inspections, engaging on behalf of families or landlords

CASE MANAGEMENT LOGISTICS

We also want to hear about case management logistics and how your team works together to support households.

4. How many families do you personally work with at any given time?
    a. Is your caseload typical of the caseloads of other staff working on Community Choice Demonstration?
    b. How challenging is managing the workload?
    c. [If yes] Can you tell me about those challenges?
    d. On average, how long do you work with a family before they manage to lease up?
        i. What are the factors that extend the time you work with a family?
        ii. What are factors that shorten the time to lease up?
5. Do families work with multiple staff during their time in Community Choice Demonstration or are they assigned to one staff the whole time?
    a. [*If families work with multiple staff*] What are the hand-off or collaboration points when families engage with different staff? Can you tell me more about that?
6. [*For in-house PHA service providers*] What challenges have you experienced providing mobility services that you associate with being part of a PHA?

    [*For external service providers*] What challenges have you experienced providing mobility services that you associate with being an external partner of the PHA? *Prompts:* contracting, oversight, communication, information sharing?

FAMILY FACTORS AFFECTING OPPORTUNITY MOVES

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

7. What are some of the things that affect families' interest or willingness to *search* for housing in an opportunity area?
    a. Can you provide a few specific examples?

    Prompts: Connections to baseline neighborhood; perception of opportunity areas; concerns about costs; type of housing; access to preferred schools, work, and services or supports.

b. 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?

    i. [*If yes*] How do they differ?

c. Can you tell me about any family characteristics that make it challenging to search for housing in an opportunity area?

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

8. What factors affect whether families *move* to an opportunity area?

    a. Can you provide a few specific examples?

    Prompts: Connections to baseline neighborhood; perception of opportunity areas; concerns about costs; type of housing; access to preferred schools, work, and services or supports.

    b. Do these factors differ for new admission families compared with existing voucher holders?

    c. Can you tell me about any patterns that you have observed about family characteristics that make it challenging for some families to move to an opportunity area?

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

PHASE 2 AND 3 [PRE-MOVE APPOINTMENT AND FAMILY PREPARATION]

Now we'd like to walk through the phases of services and supports you offer to families to hear about service delivery and relative effectiveness.

9. Let's start with when you first make contact with the families enrolled in the mobility program.

    a. How do you first make contact with families?

    b. Tell me about any challenges that you encounter initially engaging with families.

10. In your experience with Community Choice Demonstration 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. Do families tend to prioritize housing or neighborhood preferences?

c. [*If voucher families do tend to have specific ideas in mind*] Is there a difference between new admission families and existing voucher families in whether they have a particular unit or neighborhood in mind?

11. During the pre-search phases of engagement, the pre-move appointment (Phase 2) and family preparation (Phase 3), what is the main focus of your work with families? Tell me more about that.

    a. [*SHOW LIST OF SERVICES*] Are any of these services not provided or offered to families?

        i. [*If yes*] Why is that service not offered?

    b. How frequently do you interact with families during these pre-search stages?

        i. What factors influence the frequency or amount of time you spend with a family during phase 2 or 3?

    c. Which activities, if any, happen in a group setting?

    d. What referrals, if any, do you make to outside service providers?

        i. For roughly what share of families do you make these referrals?

12. Of the pre-search services, which ones do you think are effective or important for supporting families' housing searches and moves to opportunity areas?

    a. Why are these services important for families?

    b. Of these services, which is the *most* important service for helping families successfully search and lease up?

        i. Why do you think this service is most important?

    c. Are any of the pre-search services less effective?

        i. [*If yes]* Why do you feel they are less effective??

PHASE 4 [HOUSING SEARCH SERVICES]

13. What happens after a family says they are ready to move into Phase 4, which is when they begin their housing search?

a. [*SHOW LIST OF SERVICES*] Are all of the phase 4 services offered to support the housing search?

    i. [*If no*] Which ones are not offered? Tell me more about why a service isn't offered.

b. What is the main focus of your work with families at this stage? Tell me more about that.

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

    i. What factors influence the frequency or amount of time you spend with a given family during the housing search process?

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

    a. Does [name of service provider] provide families with unit referrals for available units in the opportunity areas they are interested in?

        i. About how many unit referrals do you provide a given family?

        ii. How do you take into consideration a family's wants and needs, identified during the pre-move phase, when you develop rental referrals?

        iii. How much do you typically know about the listed landlords or properties for these referrals?

15. 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 in opportunity areas?

    Prompts: Knowledge of opportunity areas; time available to search; transportation; search costs; experiences of housing discrimination; 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 area neighborhoods in which families are more successful finding housing with their voucher than others?

        i. [*If yes*] Why do you think that is?

    Prompts: More affordable units to choose from, transportation access, landlord acceptance of vouchers

16. Of the housing search assistance services, which do you think are effective or important for supporting moves to opportunity areas?

    a. Why do you think they are effective?

    b. Of these, which is the *most* important for helping families move to an opportunity area?

        i. Why do you think this service is most important?

    c. Are any of the housing search services less effective?

        i. [*If yes]* Why do you feel they are less effective?

17. [*SHOW LIST OF SERVICES*] Are all of these financial services or supports available to families?

    a. [*If no*] Which ones are not offered? Tell me more about why a service isn't offered.

18. How do you determine the level of financial support to provide a family?

Prompts: Flexible expenditures fund, caps on assistance level, individual family need

    a. What role do you play in administering this financial assistance?

        i. Who else, if anyone, is involved in decisions on providing financial assistance?

19. How useful is the financial assistance for supporting moves to opportunity areas?

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

        i. Why do you think that is?

        ii. Can you provide an example of how this assistance has been helpful to a family you serve?

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

        i. Why do you think that is?

PHASE 5 THROUGH 7 [LEASE-UP AND POST-MOVE SERVICES]

1. We are going to shift gears and talk about the services that are offered to families during lease up and after they move. These are phases 5, 6 and 7 of the Demonstration. [*SHOW*

LIST OF SERVICES] Are all of the phase 5-7 services offered to support families during lease-up and post-move?

   a. [*If no*] Which ones are not offered?

   b. Tell me more about why a service isn't offered.

2. Tell me about the main focus of your work with families during phase 5 of the Demonstration – that is, lease-up?

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

      i. What factors influence the frequency or amount of time you spend with a family during lease up?

3. How much time do you typically spend with the Housing Choice Voucher staff during the lease-up phase?

   a. What do these engagements usually concern?

   b. Tell me about any challenges coordinating with PHA or HCV staff.

      i. How have you addressed these challenges?

4. Thinking about the families that you have worked with as part of the Demonstration that have moved, but not moved to Opportunity Areas – why do you think that they did not move to Opportunity Areas?

5. Turning back to families who move to an opportunity area, what is the main focus of your work with families once they successfully lease up and move into their new home?

   a. Can you give me an example of how you would engage with a family after they have moved, during the phase-6 post-move check-ins?

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

   c. What influences the frequency or amount of time you spend with a family after they have moved?

6. 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 of how these check-ins have been helpful to a family you serve?

OVERALL REFLECTIONS ON HOUSEHOLD SERVICES AND ENGAGEMENT

7. In general, what mode of communication do you typically use to interact with families?

a. How does the mode of communication vary over the course of your work with a family, if at all?

b. How does it vary across families?

c. Do the communication preferences differ between new and existing voucher families?

i. [*If yes*] How so?

d. What are some of your key challenges to staying in contact with families during and after their move?

i. How common are these challenges?

e. Has the frequency of communication with families changed, on average across families, since our first site visit in [late 2023/early 2024]?

i. [*If yes*] How so?

ii. [*If yes*] Why do you think the frequency has [increased/decreased] since earlier in the demonstration?

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

a. Once you offer a service, how do you think families decide which services to use?

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

9. 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 Community Choice Demonstration?

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

10. Thinking about the services you have provided to Demonstration families - what has been challenging about providing services?

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

Prompts: 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 Community Choice Demonstration engages with landlords.

31. What does landlord engagement typically entail?

32. Can you describe an example of how you conduct landlord outreach and engagement?

Prompts: Identifying landlords with available units in opportunity areas, informational materials, direct outreach to landlords of available units, education about the voucher and mobility program?

a. Is outreach done on behalf of specific families or for the program as a whole?

33. How responsive are landlords to your outreach efforts?

a. What questions or concerns do landlords have about the voucher program?

i. What about the Community Choice Demonstration program?

b. How effective is landlord outreach or engagement for supporting moves to opportunity areas?

c. How much do you typically interact with a landlord or property manager during the housing search and lease-up process?

d. What do these interactions usually involve?

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

34. The next few questions are about the process of providing expedited inspections for units in opportunity areas.

a. Are expedited inspections taking place?

i. [*If no*] What has kept them from happening?

ii. [*If yes*] Describe how the expedited inspection process works.

Prompts: [Service Provider] coordination with PHA staff, steps in the process, average length of time to complete

b. How does the expedited inspection process differ from the standard process?

c. How important do you think expedited inspections are in encouraging landlords in opportunity areas to accept voucher holder families?

1. 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?

    a. [*If any role identified*] Can you tell me more about those processes?

    b. How important do you think they are to landlords?

2. The next couple of questions concern financial incentives available to landlords, which you can see on this list. [*SHOW LIST OF SERVICES*] Are all of the financial incentives available to landlords?

    a. [*If no*] Which ones are not offered?

        i. Tell me more about why a service isn't offered.

    b. When do you engage with landlords about these available incentives?

3. How important do you think financial incentives for landlords are in encouraging landlords in opportunity areas to accept voucher holder families?

    a. Which of the financial incentives do you think are most important or effective?

    b. Why do you think these are the most important?

    c. Does the importance vary by type of landlord?

4. Do you engage with landlords after a Community Choice Demonstration tenant moves in?

    a. [*If* yes] Can you give an example of what you typically discuss during post-lease up engagements?

    Prompts: Conflicts with tenants, information about voucher, CCD and PHA/HCV program roles post lease-up, information on additional units coming online

5. How frequently do you engage with landlords after a family moves in?

6. In what ways, if any, are post-move check-ins with landlords important in helping clients maintain tenancy?

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

        i. In what ways?

7. Have you encountered any challenges in engaging with landlords during:

    a. Outreach?

i. [*If yes*] Can you provide an example?

b. Tenant leasing?

i. [*If yes*] Can you provide an example?

c. Post-move check-ins?

i. [*If yes*] Can you provide an example?

d. What has gone well in terms of engaging with landlords?

e. In your opinion, what is missing from the program that would really make a difference for recruiting and retaining landlords in opportunity areas?

8. Are there any services or incentives you offer that do not seem to be important to landlords?

a. Which are these?

i. Why do you think they aren't important?

9. Do services and incentives landlords use vary by landlord characteristics, such as the number of properties owned?

a. Does it vary by a landlord's prior voucher involvement?

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

a. Does this role change over time, from the search or lease-up phase to lease-up? Do you engage in rent negotiations with landlords?

b. [*If yes*,] Can you give an example of a typical negotiation?

11. 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 leasing up?

ADDITIONAL CONTEXT ON MOBILITY-RELATED SERVICES [HCV DIRECTOR OR DIRECTOR OVERSEEING CCD]

12. Tell me about any changes in the services or incentives offered – or how they are offered – since Community Choice Demonstration launched?
    a. What brought these changes about?

13. Does your program offer any other services or supports to Community Choice Demonstration 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 Community Choice Demonstration.

14. What do you think is working well with Community Choice Demonstration implementation so far?

15. What do you think could be done to improve implementation of Community Choice Demonstration, and support your work with families moving to opportunity areas or with landlords?

16. Is there anything that I did not ask about the Community Choice Demonstration that is important for us to understand?

17. 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.