Instrument 2. Interview Protocol

Thank you for being here with us today. My name is [name], and this is my colleague [name]. As you know, we are from [the Urban Institute/MEF Associates], a non-partisan policy research organization based in [Washington DC/Alexandria, VA].

This interview is part of a project funded by the Administration for Children and Families at the U.S. Department of Health and Human Services (HHS). The goal of this project is to improve the experience of families served by multiple benefit programs through coordination across programs/agencies. To support your [agency's/jurisdiction's] coordination goals, we are developing and piloting a Toolkit of materials to support your agency in coordinating programs and services. This interview is not part of any HHS monitoring or auditing activities. We will be asking you questions about you and your pilot site implementation team's experiences using the Toolkit and other supporting materials provided during the pilot period, receiving coaching from our team to support use of the Toolkit, additional technical assistance provided to your team, and your experiences more generally as you've been working to advance coordination to improve the experiences of families.

All responses will be kept private. Anything you choose to share will only be used for the purposes of this project and we will not share information outside the research team. This interview will take no longer than 60 minutes. [If first-round interview] We will ask you to complete another interview like this one at the end of the pilot period.

Your participation in this interview is voluntary. You are welcome to skip any questions or stop the interview at any time without consequence. Although we will take notes, we will not share these notes with anyone outside of our research team.

The information you provide will help make the Toolkit more useful for supporting planning for and advancing human service program coordination and integration to advance their goals of improving the experiences of families who can benefit from their services.

We do not think there are any serious risks to you in participating. We will incorporate learnings from this pilot into development and revisions to the Toolkit, including revisions based on information collected through this interview and other data collection activities. We will not identify individual respondents, or their organizations, based on information we gather through this interview. That said, there's a small chance that a discerning reader could figure out from whom a piece of information originated if only a small number of people would know this information. We try very hard to avoid this, but we want to make you aware of the possibility.

In these documents, we may identify your program as a contributor to the project, but we will not include the names of individual respondents in any reporting. Personally identifiable information will not be used to retrieve interview records or data and will not be disclosed publicly.

Finally, 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 #: 0970-0531, Exp: 9/30/2025.

Do you have any questions?

Do you consent to participate in the interview? [IF YES, INTERVIEWER PROCEEDS]

One last thing – we would like to record this interview to help us accurately capture the information you share. The recording is just a back-up for our notes and will be kept within our research team. The interview recording will be deleted at the end of the project.

Is it okay with you if we record the interview? [IF YES, NOTE TAKER PRESSES RECORD]

For more information

Kate Stepleton
Project Director
Principle Associate, MEF Associates
kate.stepleton@mefassociates.com

Victoria Kabak
Contracting Officer's Representative (COR)
Policy Director, US Department of Health and Human Services
Administration for Children and Families
Victoria.Kabak@acf.hhs.gov

Questions

Introductions

1. Can you tell me a bit about what your role began as and how it has evolved as part of your pilot's implementation team?
2. Which sections of the toolkit or other materials have you discussed with your coaches or provided feedback on since the beginning of the pilot?
    a. *Probe by mentioning different parts of the Toolkit or other materials developed in collaboration with the site.*
3. Which of these materials have you since used as part of your agency's service delivery?
    a. *Probe by mentioning different parts of the Toolkit or other materials developed in collaboration with the site*

We have some additional questions for you about some of the work your team has done [since the beginning of the pilot/since our last interviews with your team in [MONTH]] and what has been helpful in advancing your team's work.

Note to interviewer: Skip to Toolkit or pilot activity topics/sections that interviewee indicates they have used directly or been involved in efforts related to.

Diagnosis: Clarifying the problem to be solved and assessing readiness for change

You mentioned that your team completed work to assess the needs of the families you serve and your organization's readiness to meet those needs.

4. [If the team has assessed family needs] What was the process like for your team to assess the needs of families and to identify a target need to address?
    a. What support or information was most useful as your team did this work?
    b. What was less helpful?
    c. What, if anything, would have been helpful for your team as you went through this process? How could the project team improve tools/resources and assistance for this activity?
5. [If the team has completed the readiness for coordination diagnostic process] What was the process like for your team to complete the readiness for coordination diagnostic process?

a. What, if any, tools, resources, or assistance provided by the coaching team did you and your team rely on through that process?

b. How helpful were those? *Probe on tools/resources and assistance separately*

c. How could the project team improve tools/resource and assistance for this activity?

d. Did you use any other tools, resources, or assistance to support this readiness assessment?

6. How and to what extent did the diagnostic process help your team clarify next steps for individual programs?

    a. Did it clarify next steps for work for your collaboration effort? Please explain.

Planning: Identifying and selecting potential strategies for improving the experience of families served by multiple programs

Now we would like to spend some time thinking about how your team has worked to select potential strategies for improving the experiences of families through coordination.

7. Has your implementation team selected a potential strategy or strategies to advance whole family benefits or services? If so, which strategy or strategies has your team decided to focus on?

    a. [If not] Have there been any barriers to selecting a strategy or strategies?

        I. To what extent could additional guidance, either through materials or coaching/technical support, support your team in overcoming these barriers? [Skip to next section]

8. What did the process of selecting this strategy entail? What were your reasons for selecting this strategy?

9. What, if any, tools, resources, or assistance provided by the coaching team did you and your team rely on through that process?

    b. How helpful were those? *Probe on tools/resources and assistance separately*

    c. How could the project team improve tools/resources and assistance for this activity?

10. Did you use any other tools, resources, or assistance to support this readiness assessment?

Implementation: Implementing selected strategies to improve coordination/collaboration areas and tracking progress and continuously improving

Great, next I wanted to ask about any work your team has done to plan implementation of the selected coordination strategy or strategies.

11. Please describe the process of planning implementation of the strategy or strategies you selected in a bit more detail. [If N/A, skip to next section]
    a. Which government offices/agencies/programs have been involved, and how?
    b. Which community or other organizations have been involved, and how?
12. What, if any, tools, resources, or assistance provided by the coaching team did you and your team rely on the process of implemented the selected strategy or strategies?
    a. How helpful were those? *Probe on tools/resources and assistance separately*
    b. How could the project team improve tools/resources and assistance for this activity?
13. Did you use any other tools, resources, or assistance to support your implementation planning for the selected strategy or strategies?

Now I would now like to discuss the implementation team's work on establishing a plan to tracking progress of your coordination effort and your continuous improvement plan as you implement your selected strategy or strategies.

14. Has your team created a plan for tracking progress as you implement your selected coordination strategy/strategies?
    a. [If no] Why not? [Skip to question 19]
15. Please describe your plan for tracking progress in a bit more detail.
    a. Who was involved in the development of your plan for tracking progress?
    b. How did you identify metrics to track and a process to track them?
16. What challenges have you encountered in establishing this plan?
17. What, if any, tools, resources, or assistance provided by the coaching team did you and your team rely on through that process?
    a. How helpful were those? *Probe on tools/resources and assistance separately*

   b. How could the project team improve tools/resources and assistance for this activity?

18. Have you begun implementing this plan and if so, what have you learned so far?
19. Has your team created a plan for continuously improving as you implement your selected strategy/strategies?
    b. [If no] Why not? [Skip to next section]
20. Please describe your plan for continuously improving in a bit more detail.
    a. Who was involved in the development of your plan for continuous improvement?
21. What challenges have you encountered in establishing this plan?
22. What, if any, tools, resources, or assistance provided by the coaching team did you and your team rely on through that process?
    a. How helpful were those? *Probe on tools/resources and assistance separately*
    b. How could the project team improve tools/resources and assistance for this activity?
23. Did you use any other tools, resources, or assistance to support your implementation planning?
24. Have you begun implementing this plan and if so, what have you learned so far?

Usability and delivery feedback on resources shared

Now that we have reflected on your team's process, we want to spend some time discussing the structure, usability, and format/delivery mode for the main Toolkit your coaches have shared and refined with your team as well as any other materials developed to support your team.

25. Tell me about your impressions of each section of the Toolkit you used. [Probe on each section]
    a. To what extent did this section make you interested in using the Toolkit further?
    b. What could be improved to make it more engaging for users like you?
26. To what extent did the process/roadmap laid out in the Toolkit reflect how your team has been thinking about your coordination work?

a. Do you have any recommendations for bringing the Toolkit structure closer to the process your team has used to identify and implement changes to improve the experience of families?

27. What types of materials have you found most useful as an [describe interviewee's role on the implementation team]?

    a. *Probe on worksheets, diagnostics, overviews, check-lists, including both existing resources and those developed by the team.*

28. What types of materials have you found to be most useful for collaborating across partners and staff roles across the coordination effort?

    a. *Probe on worksheets, diagnostics, overviews, check-lists, including both existing resources and those developed by the team.*

29. What else about the Toolkit and other materials developed in partnership with your coaching team has been most useful for your team? What made it useful?

Closing reflections

We would now like to close with a few final questions that look toward your future coordination work as part of the pilot and beyond.

30. What do you see as your team's next steps for advancing your effort to improve the experiences of families across multiple benefits programs through coordination of services?

    a. Probe on steps as part of the pilot (diagnostic, planning, implementation) as well as specific steps within each based on where the team is at currently (i.e. establishing new processes across agencies/programs, bringing on community partners, planning data coordination/integration)

31. What, if any, key challenges do you foresee in the process of implementing your strategy?

32. What types of materials or resources do you think will be helpful in advancing your efforts that you may not have mentioned already in this discussion?

    a. Probe on format/delivery model and content

33. What types of coaching or technical assistance do you think will be helpful in advancing your efforts that you may not have mentioned already in this discussion?

    a. Probe on specific things that outside assistance is providing that the team/agency does not have the capacity for (i.e. legal, technical

data/technology system implementation or project planning skills, extending capacity of team, providing an external/third party perspective/facilitator)

34. What have been your - or your program's - biggest lessons learned about advancing cross program coordination efforts so far?
35. What do you know now that you wish you knew before starting the pilot process?
36. Is there anything else we have not talked about but you think we should know or you would like to share with us?

Thank you so much for your time. We appreciate all that you have shared.