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REPORT

FINAL REPORT

Integrated Service Delivery: Site Visits to Organizations in the Working Families Success Network (WFSN)

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CONTENTS

I INTRODUCTION 1

II IMPLEMENTING INTEGRATED SERVICE DELIVERY 5

A. Delivering integrated services 5

B. The role of partners in integrated service delivery 8

III ENGAGING PARTICIPANTS IN INTEGRATED SERVICES 11

A. Reasons why participants may not engage in integrated services 11

B. Participant engagement and retention strategies 12

IV SUPPORTING INTEGRATED SERVICE DELIVERY 15

A. Staffing 15

B. Use of data 16

V KEY CHALLENGES AND LESSONS LEARNED 17

REFERENCES 19

APPENDIX A SITE VISIT DATA COLLECTION AND ANALYTIC METHODS

APPENDIX B-1 WFSN SITE VISIT INTERVIEW GUIDE: MAIN ORGANIZATION MANAGERS

APPENDIX B-2 WFSN SITE VISIT INTERVIEW GUIDE: MAIN ORGANIZATION DIRECT SERVICE STAFF

APPENDIX B-3 WFSN SITE VISIT INTERVIEW GUIDE: PARTNER ORGANIZATION MANAGERS

APPENDIX B-4 WFSN SITE VISIT INTERVIEW GUIDE: PARTNER ORGANIZATION DIRECT SERVICE STAFF

APPENDIX B-5 WFSN SITE VISIT: PROGRAM PARTICIPANT INTERVIEW GUIDE

APPENDIX C-1 WFSN SITE VISITS: DATA USE QUESTIONNAIRE FOR STAFF

APPENDIX C-2 WFSN SITE VISITS: PROGRAM PARTICIPANT BACKGROUND INFORMATION QUESTIONNAIRE

EXHIBITS

II.1 Promising practices in ensuring that participants are offered services across pillars through organization-driven approaches 6

TABLES

A.1 Organizations visited during WFSN site visits A.4

A.2 Types of respondents, by organization A.7

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I. INTRODUCTION

Individuals and families with chronic unemployment, low levels of income, or high levels of debt generally face a multitude of barriers to economic success and must seek support from a patchwork of public and nonprofit providers to achieve self-sufficiency. Many organizations offer activities and support services that address obstacles to employment and education, income and work supports, or financial and asset building, while referring participants to auxiliary service providers for services such as child care, transportation, or health care. This approach requires participants to engage in activities and services from different service providers, each offering different program goals and targeting different outcomes. Such a siloed system can be daunting for individuals—and especially families—as they go from one place to another to find assistance for targeted problems in pursuit of different goals at different organizations.

In 2005, the Annie E. Casey Foundation pioneered an approach that breaks down service delivery silos by offering *integrated service delivery* (ISD) across three pillars: (1) employment and career advancement, (2) financial and asset building services, and (3) income enhancements and work supports (Gewirtz and Waldron 2013). This approach—initially implemented through the Center for Working Families—was expanded and rebranded as the Working Families Success Network (WFSN) in 2013 through implementation by a network of organizations, including the Local Initiatives Support Corporation (LISC), United Way Worldwide, and MDC (a research and community development organization working with community colleges). These organizations serve as intermediaries between WFSN and the direct service organizations that implement ISD in over 50 communities nationwide.[1]

Pillars of ISD

1. **Employment and career advancement** helps participants gain work readiness, stay in and complete college or a training program, or obtain, retain, and advance in a job.
2. **Financial and asset building services** help build a family's financial knowledge, reduce their debt, improve credit scores, and increase access to savings and wealth-retaining financial products.
3. **Income enhancements and work supports** include those that assist families in accessing public benefits and other income supports to increase economic stability.

WFSN considers ISD to occur if services are integrated across two—and preferably three—of the pillars to support families in their pursuit of financial stability. Although organizations have flexibility in how to implement ISD, it is expected that integration be deliberate and service packages be targeted to a participant's level of need. For example, service delivery might be integrated differently for each participant, depending on the needs of the family, or it might occur in predetermined ways (for example, simultaneously offering a work readiness program that includes financial coaching or sequentially offering services such that financial education immediately follows the work

[1] As intermediaries, these organizations may partially fund operations and provide other resources and technical support.

readiness program for all participants).[2] This flexibility in the implementation of ISD has fostered the expansion and growth of the WFSN nationwide, but it has also challenged program advocates' and administrators' understanding of how organizations approach ISD.

To better understand how organizations that are part of the WFSN implement ISD, the WFSN national leadership group (referred to as the "WFSN leadership") hired Mathematica Policy Research to assess implementation of ISD using three lenses: (1) a review of literature and documents to provide a context for WFSN's approach to ISD; (2) a site-level survey to gain a high-level perspective on how organizations implement ISD; and (3) visits to eight organizations to gain in-depth insights on implementation. Together, these study components provide guidance on building organizational capacity to provide ISD; identify variations in services and delivery approaches; identify promising ISD practices; and may inform the design of future evaluations.

This report shares findings from visits to eight WFSN organizations. Using information from the literature review and the site-level survey, a team of researchers from Mathematica worked with representatives of the WFSN leadership to design a series of site visits (conducted from July to September 2017) that would address the following research questions:

- What is the approach to integrating and sequencing services across the three pillars?
- How do partnerships and multiple locations per organization affect ISD?
- What organizational and staff capacities facilitate implementation of ISD?

Mathematica worked with the WFSN leadership to select eight organizations to visit in order to learn more about their unique approaches to ISD and their partnerships and organizational capacities that facilitate ISD. Using information collected in a site survey of 71 WFSN organizations,[3] the group selected organizations to visit that had reported higher and lower levels of participants receiving services in all three pillars. (For detailed information about how these groups were defined, see Appendix A.) Categorizing organizations by higher and lower levels of service integration provided an opportunity to compare their organizational approaches to ISD. In selecting the eight organizations, Mathematica and the WFSN leadership sought also to include a mix of organizations affiliated with the three different intermediaries (United Way, LISC, and MDC) and different geographical regions in the United States, as well as varying levels of urbanicity.

Mathematica used standardized data collection procedures to conduct the site visits. The two-day visits included interviews with each organization's managerial staff, direct service staff, and staff at partner organizations involved in service delivery, as well as focus groups with current or former program participants. Respondents also completed short written surveys on

[2] Maxwell and colleagues (2017) discuss in detail the mechanisms by which ISD is expected to ultimately increase self-sufficiency.

[3] The site-level survey was conducted in November and December of 2016 with 71 organizations identified as offering ISD under the WFSN umbrella. The survey asked questions about how organizations integrate service delivery and the organizational context for ISD. Maxwell and colleagues (2017) report the results of the site-level survey.

data use (for organizational staff) and demographics and services received (for program participants who took part in focus groups). See Appendix A for additional details.

In 2016, under this study of the WFSN, the Mathematica study team designed a theory of change that identifies the process by which ISD is expected to ultimately increase self-sufficiency. In the theory of change, integration of services is posited to help families focus on achieving holistic goals and see that goals can be achieved by building knowledge, skills, and abilities in the three pillars of employment services, financial education, and income supports. Gaining new knowledge, skills, and abilities can help individuals improve the quality of their employment, income, and financial security in the short term, improve stability in the intermediate term, and reach self-sufficiency in the long term.

Key site visit findings

- Organizations structure service packages across pillars in different ways to implement ISD.
- Organizational partners facilitate ISD by offering access to additional services that the organizations themselves do not provide.
- Eligibility requirements and application processes, as well as systems-level and participant-level barriers, may prevent participants from being offered or accessing services in multiple pillars.
- Organizations use strategies such as participant goal setting, developing trusting relationships with participants, and tailoring service content to engage and retain participants in services across pillars.
- Close communication among staff and defining staff roles that correspond to the three pillars facilitate ISD.
- Organizations use data to track (1) whether participants are accessing services across the three pillars and (2) participant outcomes; however, not all staff collect and use data consistently within and across organizations.

Although the site visits supported the theory of change—in that organizations are offering services in the three pillars to help participants achieve self-sufficiency—we did not identify consistent approaches in implementing ISD within and across organizations. We tried to identify patterns across organizations in several dimensions of ISD—including services offered, partnership types, and staffing structures—to identify different "models" that might be the most promising for replication and sustainability. Ultimately, although data analysis identified some commonalities in implementing ISD, specific models did not emerge. These results are consistent with those found in our prior site-level survey analysis (Maxwell et al. 2017). This report focuses on describing implementation of ISD across all eight organizations visited, and where possible, identifies patterns in and promising practices for key aspects of implementation. Although we observed few differences between the groups that reported either higher or lower levels of service provision across the three pillars, we describe those differences in this report where applicable.

The remainder of this report is organized in four chapters. Chapter II describes ISD implementation across organizations. Chapter III presents findings about how organizations engage participants in ISD. Chapter IV shows how ISD is supported through staffing and use of data. In Chapter V, we conclude with a summary of overarching findings and a discussion of

next steps that could further knowledge about ISD. Throughout the report, text boxes highlight promising practices in implementing ISD across the organizations visited. While these practices are not associated with program outcomes, staff at the organizations we visited identified these practices as ones that promoted service take-up and participant retention. Three appendices follow the body of the report. Appendix A provides details on site selection and on site visit data collection and analysis methodology. Appendix B contains the site visit interview protocols. Appendix C contains the two written questionnaires that respondents completed during the visits.

II. IMPLEMENTING INTEGRATED SERVICE DELIVERY

In this chapter, we discuss two key findings related to how organizations implement the ISD approach, concentrating on what factors do or do not facilitate ISD. It sheds light on the following two research questions: (1) What is the approach to integrating and sequencing services across the three pillars and (2) how do partnerships and multiple locations per organization affect ISD? Section A discusses the approaches that organizations take to deliver integrated services, and Section B delves into how two important aspects of ISD—partnerships and locations—affect its implementation. This chapter sets the stage for understanding reasons why participants may not receive ISD and strategies for engaging participants, which are discussed in Chapter III.

A. Delivering integrated services

Organizations structure service packages across pillars in different ways to implement ISD.

The eight organizations we visited demonstrated two primary approaches to offering ISD: (1) an organization-driven approach, through which organizations offer a standardized curriculum; and (2) a participant-driven approach, which involves determining and offering the services participants need through one-on-one meetings between a participant and a coach on staff at the organization. Organizations implemented one or both approaches, with a total of four offering an organization-driven approach, and seven offering a participant-driven approach. We discuss how these two approaches to ISD are implemented across the eight organizations, and highlight promising practices in implementation.

Organization-driven approaches. An organization-driven approach ensures that participants will be offered services across the pillars by embedding the services in the organization's standardized curricula. The four organizations that use this approach all offer a job readiness curriculum that incorporates financial education. Assistance with accessing income enhancements is offered to participants who express a need for that type of support. Three organizations targeted a specific subpopulation of their participants with these training programs, whereas the fourth offered it to all of their participants. Exhibit II.1 describes how the approaches offered by these four organizations facilitate access to cross-pillar services for program participants.

Within the context of these organization-driven programs, services across the pillars are typically sequenced in a particular order. Three of the programs begin with employment-focused services (such as soft skills training, job searching, and discussion of career pathways), followed by financial education (such as budgeting, credit and debt management, and savings). Income supports are typically offered whenever a participant expresses a need. Staff at these organizations said they structured their programs in this order partly because participants seem more receptive to financial education when it is taught in the middle of a curriculum rather than at the beginning. According to staff, participants often do not think that financial topics are relevant to them, but if these topics are included in a course that they are already taking, then they cannot easily opt out. Participants are also more invested in completing the curriculum after they have taken the employment services content, staff said, and more receptive to financial content once they have been in the program for a while.

Exhibit II.1. Promising practices in ensuring that participants are offered services across pillars through organization-driven approaches

Foothills Family Resources offers an employment readiness curriculum through its Center for Working Families program that focuses on career development, particularly in manufacturing. Given the needs of local employers, Foothills emphasizes the development of professional habits, such as being on time and dressing professionally. Foothills used to offer the curriculum in a classroom setting but, as of 2017, is providing it through eight biweekly coaching sessions so that participants do not have to wait until a new class starts to receive services. Sessions follow a structured schedule focused on topics such as financial education, resume development, interview techniques, and networking. Participants who need assistance with income supports are directed to a staff member who helps them apply for public benefits and other in-house resources, such as mental health services and food assistance. Access to income supports and other services is also available to community members not enrolled in the center.

Goodwill Industries of Central Michigan's Heartland offers services in all three pillars through Good STEPS (Supporting Transitions to Employment for Parents) and EDGE (Essential Skills Demanded by Great Employers). Both programs target people who are unemployed or underemployed; Good STEPS also targets single mothers of young children. Participants take employment readiness classes that include soft skills, and in EDGE, technical education related to manufacturing. Both programs have at least one session on financial education, and participants can make one-on-one appointments with the financial coach in Goodwill's Financial Opportunity Center (FOC). Staff also refer participants to the FOC's income supports coach if they believe, through conversations with participants, that the participants would benefit from income enhancements or other supports. Outside these programs, participants can access coaching in employment services, financial education, and income supports through the FOC.

WPSI (West Philadelphia Skills Initiative) offers an employment readiness course that lasts from 4 to 26 weeks, depending on the targeted industry. The content targets a specific industry and local employer partner, which will interview participants for full-time jobs after they complete the curriculum. Participants are also encouraged to apply for other jobs in the targeted industry while taking the course. Each course generally covers soft skills; technical skills targeted to the specific industry and employer partner (for example, training in medical coding for a health care partner); and sometimes on-the-job training, which involves working at the employer partner's site. Participants also receive job coaching during and after the course. Although the curriculum focuses mostly on employment, WPSI integrates two full-day financial education classes into each course, taught by an external consultant who specializes in financial planning. Participants can also receive one-on-one assistance from the consultant, such as help with developing a personal budget. WPSI does not offer services outside the employment readiness course.

NLEN (North Lawndale Employment Network) offers standardized training through its "U-Turn Permitted" programs: A four-week job readiness training program is offered to participants who have a felony background, and a one-week "U-Turn Permitted Express" program is offered to those without felony backgrounds. Both programs are delivered in small groups of participants; curricula cover soft skills, resume development, mock interviewing, job searching, and financial education, including credit and debt management. Participants are referred to NLEN's FOC if they express a need for assistance with income supports; they also receive transportation benefits while taking the class. Participants in the four-week program also receive one-on-one coaching from a workforce coach while they search for employment and one-on-one financial coaching, which can focus on any topics of interest to the participant. Outside these programs, like Goodwill, NLEN offers assistance through its FOC in employment services, financial education, and income supports.

Participant-driven approaches. Seven of the eight organizations we visited use coaching to implement ISD with their participants (including three of the organizations that use organization-driven approaches for specific types of participants). Under this approach, a coach at the organization assesses each participant's needs and then the coach and participant decide on specific services that the participant should access across the three pillars to meet those needs. The coach either offers services directly or refers participants to partner organizations for these services. As participants continue to receive services over time, they may work with the same coach or shift to working with other coaches on staff, depending on their specific needs.

To match participants with services under the participant-driven approach, seven organizations determine what services to recommend to participants using a combination of written applications, intake forms, and assessments to better understand participants' needs and barriers and to tailor services accordingly. Typical topics discussed during these enrollment processes include participants' work history; highest level of education received; and any potential needs related to housing, transportation, food security, or other possible barriers to economic security. Two of these organizations systematically screen for the types of income supports that participants receive and to determine whether they are eligible for any additional supports. The other organizations screen for income support eligibility only when such support appears to be a need, judging from discussions with participants or upon review of the intake forms.

Because intake processes at organizations using the participant-driven approach to ISD are structured to meet the expressed needs of participants, participants may not receive services across the three pillars. For example, a participant may first approach an organization to address a particular need, such as enrolling in a specific public benefit program, and decide that he or she does not need additional services once that need is met. At five of the eight organizations visited, a participant could meet a need in one pillar without necessarily receiving services in the other two pillars. As discussed later, organizations do use strategies to try to recruit and engage participants in services in all three pillars on the basis of perceived need, but they typically prioritize offering the services that participants say they need or want. (See the sidebar for a promising practice in ensuring that participants are offered services in all three pillars within the context of a participant-driven, coaching approach.)

Promising practice in using assessment to ensure integration. New clients at the Chinese Community Center (CCC) are required to meet individually with an employment coach and a financial coach (who also discusses income supports with the participant) when they enroll in services. While participants' needs drive what services they are offered, requiring these meetings with the coaches ensures that all participants are at least assessed for services that they may need in all three pillars, and then may be offered services in all three pillars. The employment coach mainly discusses job attainment and career development, and the financial coach discusses the importance of growing income, saving, and budgeting for big purchases. According to one staff person at CCC, "These services are very tied together. You can't talk about employment without talking about money."

As services progress beyond intake, coaches may recommend new services, and participants may also work with different staff members as additional needs arise. At four of the eight organizations visited, coaches specialize in particular pillars. Participants at

these organizations receive services or referrals from coaches in particular pillars, so they may have more than one coach, depending on their needs. For example, a participant may initially receive services from an employment coach in order to find a job; once that participant gets a job, he or she may be referred to a financial coach to develop a budget and create a savings goal. At these organizations, coaches refer participants to one another to ensure that participants are offered services across the pillars to meet their needs.

Although the participant-driven, coaching approach largely customizes services to participant needs, some patterns emerged in the services that participants take first. Those patterns in sequencing services seem to be dictated by the pillar in which the organizations provide most of their services. Staff at two organizations said that participants tend to access income enhancements first, and staff at another organization said participants tend to access employment and career advancement services first. In these cases, the services in those pillars were the ones that constituted most of the organizations' offerings, as well as the ones most in demand by the target populations they serve. Since these organizations are known in their communities for offering services in a particular pillar, participants tend to seek out those services before services in other pillars (if at all).

B. The role of partners in integrated service delivery

Organizational partners facilitate ISD by enhancing access to services in each of the three pillars. All eight organizations visited refer participants to external partners for service provision. These partners offer specific services that the WFSN-affiliated organizations themselves do not provide. The organizational relationships that develop between the WFSN-affiliated organizations and their partners help to ensure that participants are offered services across all three pillars. The major services that partners provide within each of the three pillars are as follows:

Organizational partners facilitate ISD by offering access to additional services that the organizations themselves do not provide.

- **Financial and asset-building services.** Three organizations bring in banking or other external partners to provide financial and asset-building services through classroom workshops and one-on-one meetings.
- **Employment and career advancement services.** All of the organizations refer participants to employment service providers such as American Job Centers, or to employer partners for workforce training programs and job opportunities; two organizations bring in continuing education partners that offer certification coursework on-site.
- **Income enhancements and work supports.** All of the organizations connect participants to other agencies to access public benefits and other income supports.

Two factors—"warm handoffs"[4] and colocation—appear to facilitate ISD across partners. Staff at four organizations reported conducting "warm handoffs" when making referrals to

[4] "Warm handoffs" are a referral practice in which participants are introduced to partners by the referring organizations, as opposed to giving participants contact information for partners and expecting them to contact the partner for services on their own.

partners; these warm handoffs are intended to help participants feel more comfortable when partners offer them assistance. In particular, staff said they make warm handoffs to partner agencies that specialize in income enhancements when they feel that it would benefit participants—for example, if a participant is deep in crisis, a staff member may attend the first meeting between a participant and a partner to help the participant feel more at ease. Colocation also appears to make it easier to offer a variety of services across the pillars. The majority of organizations (six out of eight) colocate at least some services with partners. Organizations that reported higher levels of participants receiving services across pillars are more likely to offer all services in one location, which suggests that having services more centrally located may lead to higher levels of service provision across pillars. Staff at WFSN organizations and their colocated partners said that colocation also facilitates warm handoffs, because organization staff can swing by a partner's office with a participant in tow.

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III. ENGAGING PARTICIPANTS IN INTEGRATED SERVICES

This chapter discusses why participants may not access integrated services and how organizations engage and retain participants in services across the three pillars. It sheds further light on one of the research questions for the site visits: What is the approach to integrating and sequencing services across the three pillars? Section A discusses why participants may not engage in services across multiple pillars, and Section B delves into how organizations address or mitigate those challenges. This chapter helps us contextualize the implementation approaches to ISD (discussed in Chapter II), as well as the staff and organizational capacities that facilitate ISD (discussed in Chapter IV).

A. Reasons why participants may not engage in integrated services

Eligibility requirements and application processes, as well as systems-level and participant-level barriers, may prevent participants from accessing or being offered services in multiple pillars.

Organization staff reported several reasons why participants may not access services across multiple pillars. Eligibility requirements, for example, may prevent participants from being offered integrated services. All eight of the organizations we visited limit services to people who meet certain eligibility requirements. In particular, the four organizations that offer curriculum-based programs have specific eligibility requirements for them, which could preclude interested potential participants from getting services across the three pillars. As discussed in the previous chapter, participants in organizations using the participant-driven approach are offered services on the basis of their perceived needs and demands, and these offers may constitute services only within a single pillar. Participants who are not enrolled in a curriculum-based program may access services ad hoc through the FOCs at three organizations, but in doing so, they may not choose to access services across the pillars. In contrast, those who are able to enroll in a curriculum-based program are ensured access to services in all three pillars.

Application processes for the curriculum-based programs may also prevent participants from accessing services across pillars. For example, both WPSI and NLEN use particularly intensive processes to select their program cohorts; applications comprise written forms, interviews with staff, assessments by staff, and, in the case of NLEN, a group activity with other potential participants. Staff at WPSI and NLEN said that they want to identify and select participants who are willing and ready to complete these intensive processes, yet they acknowledged that such exhaustive requirements may deter participants from applying for these programs and being offered services across the pillars. Notably, several program participants across multiple organizations provided negative feedback about assessments that they had to take before receiving services. Some said the assessments made them feel nervous due to the types of questions being asked or surprised that they were being asked to take an assessment at all. Respondents shared that they would have liked more time to prepare for math and reading skill assessments in particular because they had not taken academic tests in a long time.

Participants also encounter systems-level and personal barriers to accessing services. Although organizations could address some of these barriers through their service offerings, they are not able to address all of them. Staff and program participants across organizations cited lack

of child care, transportation (in both rural and urban locations), stable housing, mental health services, and issues related to immigration and citizenship as common challenges. These challenges may prevent participants from accessing integrated services because, by their nature, integrated services involve repeat engagement with organization staff, either through regular class attendance or through ongoing coaching sessions. Organizations that have tried to alleviate these barriers through their income enhancement and work support offerings have met with mixed results (see the sidebar for a promising practice in helping to alleviate participant barriers). For example, staff at seven of the organizations visited said that lack of transportation is a challenge for their participants that may prevent them from accessing services, but only two are able to offer transportation benefits to participants. Additionally, staff at four organizations said lack of child care prevents participants from taking part in services, and three of those organizations are able to facilitate child care for participants who are taking part in services.

Promising practice in overcoming barriers to participation. On the Move facilitates ISD by bringing their services to participants. Because of challenges related to transportation and child care in their rural location, staff offer services in a facility—called the Family Resource Center or FRC—attached to a community-based school where most local parents send their children. Several days each month, On the Move brings in partners to this facility, including a banking partner to offer financial services, county benefits agencies, and a continuing education provider. They also offer child care while parents are participating in services, and offer internships at the FRC so participants can gain work experience in an accessible location.

B. Participant engagement and retention strategies

Organizations use strategies such as participant goal setting, developing trusting relationships with participants, and tailoring service content to engage and retain participants in services across pillars.

The organizations we visited use a variety of strategies to engage and retain participants in services in the three pillars, as well as to encourage take-up of services across pillars among those participants who sought services in only one pillar. Although some strategies, such as monetary incentives, help keep participants engaged at a general level, three strategies—goal setting, developing trusting relationships with participants, and tailoring content to be relevant to participants—encourage participants to take up services across pillars. Some participants simply may not be interested in receiving integrated services, organization staff said. Because these participants tend to come to an organization to seek help with a particular need, and want only that need addressed, these strategies can help to engage and retain participants in services across all of the pillars.

Goal setting. Staff encourage integration of services when they work with participants to set goals across pillars. Goals cover both service take-up (for example, “meet with a financial coach to develop a personal budget”) and outcomes (such as “increase my credit score”). Organizations encourage participants to use different techniques to personally track their goals; for example, WPSI instructs their participants to write down their financial goals on a slip of paper that they keep with their credit cards or money, which helps them remember their financial goals every time they go to buy something. Further, staff said that participants responded better to setting smaller, incremental goals (such as sending a certain number of job applications per week) than

very high-level or large ones (such as attaining a job). Three of the four organizations with higher levels of service provision across all three pillars, use goal setting as a way to promote participant engagement in contrast to two organizations with lower levels of ISD.

Relationship-building between staff and participants. Staff at six of the eight organizations we visited cited the importance of building rapport, trust, and strong relationships with participants, not only to keep them engaged but also to encourage them to take up helpful services and supports across pillars. One-on-one coaching helps strengthen relationships between staff and participants—all of the organizations either included coaching or at least offered one-on-one assistance to participants. Staff said that once they had built rapport with participants, they could more effectively encourage them to engage in services across pillars that they had not already taken up (see the sidebar for a promising practice in using coaching to engage participants in services across pillars). Program participants who took part in focus groups said that the WFSN organizations were unique among organizations in their communities in that they had greater trust for the staff and felt that the staff respected them.

Promising practice in using coaching to engage participants in services across pillars. Most students initially come to the Titan Link Center, housed on the campus of Guilford Technical Community College, for services in the income enhancements pillar, such as food assistance and transportation benefits. To access these benefits, students must meet with staff regularly; staff use these meetings to coach students in topics in the other pillars, especially financial education. Staff begin by introducing financial education topics, and eventually they coach students on how to stretch their income supports and financial aid to last an entire semester, for example, and, later, to create and stick to a budget. Students may be receptive to such coaching because of the close and trusting relationships that staff cultivate with them. One focus group program participant said of the staff person who coaches her: “I feel like she cares. She treats me like family. Other people are just doing their job. She puts herself in your shoes and points you in the right direction.”

Tailoring content. As mentioned in Section A of Chapter II, program participants are not always receptive to learning about financial education topics. Staff across organizations said financial education is an important aspect of ensuring that participants achieve economic security—they want participants to first get a sustainable-wage job, and then use financial education to manage their money wisely. In addition, organizations find that participants are sometimes more receptive to financial education when it is tailored to their personal experiences. For example, Goodwill tailors its financial education curriculum to reflect participants’ experiences. Instead of asking participants to set goals to save several hundred dollars, staff encourage participants to meet a goal that seems attainable, such as saving a couple of dollars every day to eventually accumulate savings.

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IV. SUPPORTING INTEGRATED SERVICE DELIVERY

In this chapter, we discuss how aspects of organizational context—namely, organizational staffing and use of data within each organization—support ISD. Organizational context can directly affect an organization's ability to customize and integrate services across pillars and to assess and track progress toward achieving goals. This chapter focuses on answering one of the research questions for the site visits: What organizational and staff capacities facilitate implementation of ISD? Section A discusses how organizations structure their staffing to best offer integrated services to participants, and Section B delves into how organizations use data to track services received. This chapter shows how these two factors—staffing and use of data—can support the other aspects of ISD implementation discussed in Chapters II and III.

A. Staffing

Close communication among staff and defining staff roles that correspond to the three pillars help to facilitate ISD.

Assigning staff roles by pillar not only ensures that certain staff are responsible and accountable for seeing that participants receive services in their pillar but also clarifies internal referral processes. Organizations rely on staff who are specialized in the services offered in each of the three pillars. Five organizations have staff who specialize in financial services; three have staff in employment services; and four have staff in income supports. While having staff specialized in one or the other pillar enables targeted assistance in that pillar, it also facilitates service offerings across pillars by encouraging referrals to specialists in certain pillars, depending on participants' needs. As previously discussed in Chapter II, staff reported talking about and referring specific participants to one another, based on their pillars of specialty, given perceived needs and recommended services for participants. At the same time, two of the organizations also cross-train specialized staff to ensure that someone who is familiar with the service offerings in each pillar is available at all times (see the sidebar for a promising practice related to staff roles and training).

Promising practice in specializing staff by pillars. Goodwill and the Chinese Community Center (CCC) both have coaches that specialize in particular pillars—at Goodwill, three coaches specialize in each of the three pillars, whereas CCC has one financial and one employment coach. This approach allows staff to specialize in their content area and offer comprehensive services, but coaches are also cross-trained so that they can offer services in any pillar to the participants. This prevents gaps in services for participants in the event that staff are absent for a long period of time; cross-training can also facilitate service provision across pillars if the relationship a participant develops with one coach is stronger than that with another coach. If a participant prefers to work with a particular coach, that coach is equipped to serve the participant in any pillar.

Moreover, because most organizations have few staff members, staff tend to have close interpersonal relationships, which also seems to facilitate communication about ISD. Staff across the organizations said that they communicate frequently with their colleagues and managers about implementation of integrated services. They also communicate in depth about specific participants, identifying participants' needs and the services that participants should take up across the pillars. For

example, an employment coach may tell a financial coach that a participant recently got a promotion and would therefore benefit from revisiting their personal budget and finances. The financial coach would then follow up with the participant to offer that service.

B. Use of data

Organizations use data to track (1) whether participants are accessing services across the three pillars and (2) participant outcomes; however, not all staff collect and use data consistently within and across organizations.

All eight organizations visited reported using data to track whether participants are actually receiving services in each of the three pillars. Staff use these data to look for participants with service gaps—that is, those who have not received services in all three pillars—and communicate about how to offer services to fill those gaps. Of the eight organizations we visited, Goodwill has the most rigorous benchmark: staff assess whether participants have received services in all three pillars within 90 days of enrollment. Goodwill staff said they believe that participants experience better outcomes when they meet this benchmark, and having a benchmark in place helps to give staff a target to strive for. In general, however, the organizations mostly focus on tracking and assessing participant outcome data (whether the participant was employed or meeting financial goals, for example, such as buying a house or paying off debt) rather than data on service provision; furthermore, data that organizations track is driven mostly by their funding sources, not by an intentional focus on service provision across pillars.

Although the organizations report facilitating ISD through the collection and tracking of data, findings from the survey on data use administered to staff during the site visits suggest that these practices are not consistent across all staff. (See Appendix A for details on the sample and survey response rates.) A small proportion of surveyed staff reported that at the time of service delivery, their organization did not "often" or "very often" collect data on the services that participants received (15 percent for access to income enhancements, 11 percent for financial education services, and 9 percent for employment services). Moreover, staff responses did not demonstrate a common understanding of what to do with this information when it was collected. Twelve percent of respondents said they did not "often" or "very often" use data to help improve delivery of integrated services, and between 7 and 13 percent of respondents reported that they did not frequently use these data to improve participant outcomes in targeted areas. These findings are consistent with those from another study stating that staff within social mission-driven, nonprofit organizations express dissimilar and inconsistent views on how data should be used to drive decision making (Maxwell et al. 2016).

Promising practice in tracking data in order to offer services across pillars. SparkPoint Oakland's three core partners—East Bay Asian Local Development Corporation, West Oakland Job Resource Center, and Operation HOPE—regularly review data to understand whether participants are receiving services in all three pillars. The partners share a Salesforce system to track and monitor participant services and outcomes. Data is reviewed during twice-monthly "Mastermind" meetings, which includes managerial staff from all partner organizations. During these meetings, staff discuss whether participants are receiving services across the pillars and how to improve ISD for those who are not. The partners discuss which organization should assist those participants and what services they should offer.

V. KEY CHALLENGES AND LESSONS LEARNED

Our visits to eight organizations in the WFSN deepened our understanding of how organizations implement ISD. Most organizations strive to offer services across the three pillars for their participants, largely customize specific service combinations to meet participants' needs, and do not necessarily take a common approach for all participants. These findings support and expand on our findings from the WFSN site-level survey analysis that found that among the 71 sites that responded, most do not predetermine how services are integrated and may tailor services based on participants' needs. The site-level survey also identified similar challenges in implementing ISD: 30 percent of sites said that participant retention or participants' lack of interest was a challenge to customizing services (Maxwell et al. 2017). In more deeply exploring how ISD occurs in practice, we identified both challenges to offering ISD as well as strategies used to overcome these, and supports that may facilitate service integration across the three pillars. These challenges and lessons learned are summarized below.

Key challenges. The following factors may present some barriers to offering integrated services to all participants and to participants' access to services across the pillars:

- Participants may not demonstrate interest in—and therefore do not access—services across all three pillars. This is especially true of participants who receive services through a participant-driven, coaching approach, which is typically used to customize services to participant needs. If organizational staff do not engage participants in services across pillars, participants may miss out on services that could be helpful to them.
- To identify candidates who are ready to participate in services, organizations may use eligibility criteria and application processes that limit participants' access to services across all three pillars. Participants who do not meet these eligibility criteria, or are deterred by lengthy application processes, may not access services across the three pillars.
- Participants may face both systems-level and personal barriers to engaging in services across the pillars. Organizations cannot address these barriers through income enhancements and work supports alone. When these barriers are not addressed, participants may not be able to reliably access services.
- While organizations report tracking data on ISD, staff reported having different beliefs about how data can and should be used to track and enhance service delivery, with some staff (between 7 and 13 percent) reporting that they never use data to improve participant outcomes. Thorough and consistent data collection and analysis can help organizations understand how to best serve their participants through the ISD approach; when organizations do not use data systematically, it may be harder for staff to track which participants are accessing services across all three pillars, and which participants have service gaps.

Key lessons learned. The following lessons or strategies can be used to help ensure that participants access services across pillars, and thus facilitate ISD implementation within WFSN:

- Organizations can facilitate ISD by adopting a standardized curriculum that crosses the pillars. By designing and making available a curriculum that includes employment services,

financial education, and screening for income enhancements, organizations can ensure service integration for their participants. This finding is consistent with Mathematica's study on the ISD approach as implemented in community colleges through the Working Students Success Network (Price et al. 2017).

- Organizations can also facilitate ISD within the context of a coaching approach—for example, one in which participants are required to meet with coaches who specialize in each of the pillars. This approach ensures that participants are receiving services in each pillar that are responsive to their needs.
- Partnering with other organizations can help to facilitate ISD by allowing organizations to refer participants to a larger number of services in each pillar. Colocating these services and using warm handoffs may increase the likelihood that participants will access those services.
- Organizations can also address participation barriers by using specific engagement and retention strategies, including setting and tracking goals, developing close and trusting relationships with participants, and tailoring content. These strategies can help to encourage participant progress and ensure that participants access services across the pillars.
- Structuring staff roles appropriately and ensuring strong communication between staff can also facilitate ISD. Clearly defined staff roles help to clarify which staff can assist participants with services in each pillar, while close communication among staff help to ensure participants are offered services across pillars.
- Organizations can use data to identify participants who have or have not received services in all three pillars to identify service gaps across pillars. Knowing which participants have received services in each pillar helps organizations customize and recommend additional services for participants to address their specific goals or needs.

Although findings from our site visits describe ISD implementation across WFSN organizations and reveal promising practices for supporting service integration across pillars, further exploration of ISD approaches could help us understand if and how ISD helps low-income people become financially stable. The site visit component of our study was limited only to eight sites, and focused on qualitative data only. Collection of quantitative data on participant outcomes and services offered could support a more rigorous analysis of the ISD approach. In a separate memo for the WFSN leadership, Mathematica has described considerations for a more rigorous study and offered next steps for conducting such analyses.

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APPENDIX A

SITE VISIT DATA COLLECTION AND ANALYTIC METHODS

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This appendix describes the site visit data collection efforts and the analysis Mathematica conducted from the information collected during the site visits. It describes site selection (Section A), protocol and instrument development (Section B), data collection methods (Section C), and the analytic methods used (Section D).

A. Site selection

In May and June of 2017, Mathematica worked collaboratively with the WFSN national leadership group (referred to as the "WFSN leadership") to select eight organizations to visit. The WFSN leadership and Mathematica selected organizations using the results of the site survey fielded to organizations in the WFSN in November and December of 2016 (Maxwell et al. 2017). By analyzing the results of a survey question that asked sites to estimate how many of their participants had received services in all three pillars in 2015, Mathematica assigned organizations to one of two groups: (1) 11 reporting that at least 30 percent of their participants received services in all three pillars in 2015 and (2) 15 reporting that less than 9 percent of their participants received services in all three pillars in that same year. Mathematica determined the percentage cutoffs by creating a distribution of responses to the survey question, with the cutoff for the first group representing the top 75th percentile of organizations, and the cutoff for the second group representing the bottom 25th percentile of organizations. (In other words, organizations that had 9 percent or less of their participants receive services in all three pillars represented the bottom 25 percent of all organizations; organizations that had 30 percent or more of their participants receive services in all three pillars represented the top 75 percent of all organizations.) Mathematica and the WFSN leadership disregarded any organizations that reported percentages falling between these two ranges.

Mathematica shared the list of selected organizations with the WFSN leadership for final selection. Through a series of telephone and email communications, the WFSN leadership narrowed down the selected organizations to four from each group, with six alternate choices in each category in case any of the first-choice organizations refused to take part in the site visits. The selected organizations also represented diversity in implementation contexts—specifically, geographical region and urbanicity—and organizational affiliations. The aim was to strike a balance between organizations affiliated with the United Way and with LISC—these two organizations support the majority of WFSN-ISD organizations—and also to represent MDC affiliations. Although the analysis does not compare organizations across implementation contexts and organizational affiliations, the WFSN leadership used these criteria to ensure that organizations demonstrated a representative mix of these dimensions of interest.

After selecting the final eight first-choice organizations, the WFSN leadership and Mathematica invited the selected organizations to participate in the site visits. After sending out the emailed invitations, Mathematica and the WFSN leadership replaced two of the eight first-choice organizations (one from each group) with alternate choices; the replaced first-choice organization from the first group reported that it was not implementing the ISD strategy, and the replaced first-choice from the second group was unresponsive to communication about the site visits.

The eight WFSN organizations visited demonstrated diverse implementation settings, including varying geographical contexts, target populations, and an array of service delivery

approaches. Table A.1 provides brief background details about each organization. Organizations are located in nearly every region of the United States (the West Coast, Midwest, Northeast, South, and Mid-Atlantic). Six of the eight organizations operate in urban environments, and the other two are in semiurban or rural communities. The service approaches that the organizations offer include both individualized coaching and classroom-based training programs.

Table A.1. Organizations visited during WFSN site visits

Organization	Location	Setting	Main affiliation	Target population	Service approach
Chinese Community Center	Houston, TX	Urban	United Way and LISC	Low-income and unemployed or underemployed community members	Individualized financial and employment coaching (including screening for eligibility for income enhancements); on-site vocational training and financial workshops
Foothills Family Resources	Slater, SC	Rural	United Way	Low-income and unemployed or underemployed community members	On-site assistance with income enhancements; employment and financial training through Center for Working Families program[a]
Goodwill Industries of Central Michigan's Heartland, Inc.	Battle Creek, MI	Urban	United Way	Unemployed or underemployed community members; specialized services for single mothers and participants interested in manufacturing jobs	Individualized employment and financial coaching (including screening for eligibility for income enhancements); vocational training for specific populations (Good STEPS for single mothers and EDGE for participants interested in manufacturing jobs)
North Lawndale Employment Network	Chicago, IL	Urban	LISC	Low-income and unemployed or underemployed community members; specialized services for people with felony convictions	Job readiness curriculum for ex-offenders (U-Turn Permitted) and for unemployed or underemployed community members (U-Turn Permitted Express); direct provision of income enhancements; individualized financial coaching
On the Move	Napa, CA	Rural	United Way	Low-income community members; specialized services for youth in foster care	Individualized coaching services for income enhancements, and financial and employment services, including training and workshops
SparkPoint Oakland	Oakland, CA	Urban	United Way	Low-income community members	Individualized financial and employment coaching (including screening for eligibility for income enhancements)
Titan Link Center at Guilford Technical Community College	Jamestown, NC	Urban	MDC	Community college students in need of services	Direct provision of income enhancements; individualized financial and employment coaching
West Philadelphia Skills Initiative at University City District	Philadelphia, PA	Urban	LISC	Unemployed or underemployed community members	Job readiness curriculum that targets specific employer partners; individualized employment and financial coaching

Source: Qualitative data collected during site visits to these eight organizations from July through September 2017.

[a]This organization planned to end its classroom-style training program and instead implement a one-on-one coaching approach beginning in October 2017.

B. Protocol and instrument development

Mathematica developed the site visit protocols and instruments collaboratively with the WFSN leadership, with questions informed by the WFSN approach to ISD, Mathematica's review of literature on ISD, and the findings from the WFSN site survey report. Mathematica prepared the following protocols and instruments for site visit data collection:

1. **Staff protocols (management and direct service).** To understand the ISD implementation approach at each organization, Mathematica designed separate protocols for use with management and with direct service staff that asked questions about the following topics: (1) respondent background, (2) service environment, (3) target population for services, (4) integrated services offered, (5) measurement of integrated services, (6) staffing for ISD, (7) organizational culture, (8) organizational partnerships, (9) description of core integrated services, (10) participant retention and progress, and (11) outcomes measurement. Protocols for use with managerial staff included questions about program design, supervision and training of staff, and measurement of program outcomes, whereas protocols for use with direct service staff focused more on direct implementation. These protocols are found in Appendix B.1 (management) and B.2 (direct service).
2. **Partner protocols (management and direct service).** To understand the role of partners in the ISD approach at each organization, Mathematica designed separate protocols for use with partners' management and partners' direct service staff that asked questions about the following topics: (1) respondent background, (2) service environment, (3) target population for services, (4) services offered to ISD participants, (5) staffing, (6) organizational partnerships, (7) description of core services offered to ISD participants, (8) participant retention and progress, and (9) outcomes measurement. As with organizational staff, protocols for use with managerial staff included questions about program design, supervision and training of staff, and outcome measurement, whereas protocols for use with direct service staff focused more on direct implementation. These protocols are found in Appendix B.3 (management) and B.4 (direct service).
3. **Focus group protocol.** To understand the perspective of participants who have received or were currently receiving services at each organization, Mathematica designed protocols for use with program participant focus groups. These protocols asked questions about the following: (1) participant background, (2) participants' goals, (3) organizational climate, (4) participant recruitment and enrollment, (5) core program components received, (6) participation and progress, and (7) coordination and linkages with other services. The protocols ended with a wrap-up section that asked participants to describe the best and hardest parts about receiving integrated services and to recommend ways to improve services. This protocol is found in Appendix B.5.
4. **Questionnaire on data use.** To understand how organizations use data to measure implementation of ISD and improve or change services, we prepared a questionnaire on organizational data use. Mathematica asked only staff of the WFSN organizations (not staff at partner organizations) to complete this questionnaire, which covered the following topics: (1) types of participant service receipt data collected in each of the three pillars and when data are collected, (2) how staff use data, (3) resources available for data collection and analysis, (4) views and beliefs about data collection and use of data, and (5) which

individuals within the organization manage and use data. This questionnaire is found in Appendix C.1.

5. **Questionnaire for focus group participants.** Mathematica also passed out a brief questionnaire to focus group participants who had received or were receiving services from each organization we visited. After gathering basic information on participants' backgrounds and demographics through the questionnaire, as well as information on participants' experiences with ISD, Mathematica site visitors used those results to tailor the discussion with participants. The questionnaire covered the following topics: (1) length of service receipt; (2) types of services received, by pillar; (3) barriers experienced in receiving services; (4) whether participants were currently enrolled in a training or educational program; (5) whether participants were currently employed; (6) gender; (7) highest education level; (8) age; and (9) whether participants were parents or guardians and, if they were, how many children they had. This questionnaire is found in Appendix C.2.

Mathematica initiated the drafting of these protocols and instruments and incorporated the WFSN leadership's feedback solicited during telephone calls and emails. After the first site visit (in July 2017), Mathematica made small tweaks to the wording of a few questions in the protocols.

C. Data collection

Mathematica set up phone calls with the organizations to select dates for the visits and identify respondents. The organization's executive director (or a staff person in a similar role) or the person who led ISD at that organization was generally the person with whom Mathematica site visitors spoke. During planning, Mathematica drafted an agenda for each site visit that included one-on-one or small group interviews with the organization's executive director and any other managerial staff, with the service staff who delivered services in the three pillars, and with partner organization administrators and service staff who delivered services to ISD participants. Mathematica also asked staff at the selected organizations to identify and recruit four to eight program participants for a focus group discussion. To ensure that program participants could speak knowledgeably about their experiences with ISD, Mathematica asked for participants who had been enrolled in services for at least three months. Some organizations could not accommodate this request, and instead asked current participants (those who had been receiving services for less than three months) to meet with Mathematica staff.

Mathematica used consistent data collection methods to conduct the eight site visits, which occurred in July, August, and September 2017.[5] Each site visit, conducted by two Mathematica site visitors, lasted for two days. One site visitor led each interview while the other took notes; interviews were also recorded. Most interviews took place at the organization's main facility, but in some cases, site visitors traveled to a second organizational location and/or partner locations to conduct interviews with partner staff. Interviews typically lasted for approximately an hour,

[5] Mathematica made two small changes to otherwise standardized data collection methods. During a visit to one organization, Mathematica observed program services at the request of staff; however, observations were not part of the data collection methods and site visitors did not observe program services at other organizations. Additionally, Mathematica site visitors conducted phone interviews with two respondents (at two different organizations), because these respondents were not available to meet in person while site visitors were on site.

except for interviews with executive directors (or staff in similar roles), which typically lasted for 90 minutes, and with the focus groups, which lasted for 75 to 90 minutes. A diverse set of respondents participated in the site visits (Table A.2).

At the conclusion of the interviews with organizational staff, site visitors asked staff to fill out the data use questionnaire at their convenience. The site visitors collected some of these questionnaires before the end of the visit; they collected others via email after the visit, but not all of the respondents answered requests that they email the questionnaires to Mathematica after the visit. Across organizations, the response rate to the questionnaire was 88 percent.

Site visitors asked focus group participants to fill out and turn in their questionnaire before the focus group discussions began. At the end of the focus groups, participants were given a $25 Visa gift card to thank them for their time and participation. All of the focus group participants completed the questionnaire. Both the data use and focus group questionnaires typically took respondents 5 to 10 minutes to complete.

Table A.2. Types of respondents, by organization

Organization	Organization staff (managerial and direct service)	Partner staff (managerial and direct service)	Focus group participants	Data use questionnaires distributed	Data use questionnaires distributed
Chinese Community Center	4	5	5	4	4
Foothills Family Resources	4	8[a]	4	4	4
Goodwill Industries of Central Michigan's Heartland, Inc.	9	2	4	8	7
North Lawndale Employment Network	9	0	3	9	7
On the Move	8	3	5	8	7
SparkPoint Oakland	5	6	11	10	9
Titan Link Center at Guilford Technical Community College	9	3	3	4	4
West Philadelphia Skills Initiative at University City District	5	1	9	5	4
Total	53	28	44	52	46

[a]Included four members of the organization's volunteer board of directors.

D. Analysis

Mathematica used Excel to analyze both qualitative data from interviews and quantitative data from the questionnaires. To analyze the interview data, site visitors cleaned notes from interviews and then entered the notes into an Excel spreadsheet, which allowed them to conduct a cross-site analysis to describe common elements and differences across organizations in ISD implementation. The spreadsheet contained (1) tabs for each topic in the protocols, (2) rows for each protocol question or topic, and (3) columns for each organization visited. To complete each cell in the spreadsheet, site visitors summarized answers from all respondents for a single site visit per question or topic. Two members of the Mathematica study team then completed a separate analysis spreadsheet, which briefly summarized findings from the notes spreadsheet, allowing study team members to more easily identify trends and differences in the topics across the eight organizations. For the questionnaire results, a Mathematica study team member

analyzed survey answers using percentage distributions as statistics to describe information captured as binary and categorical variables and averages for information captured as continuous variables. A senior member of the study team reviewed this analysis.

APPENDIX B-1

WFSN SITE VISIT INTERVIEW GUIDE:

MAIN ORGANIZATION MANAGERS

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Introduction (read by interviewer):

As you may know, Mathematica Policy Research is conducting the Working Families Success Network (WFSN) evaluation on behalf of its funding partners. This study will document how a sample of sites implement an integrated service delivery under the WFSN umbrella as well as challenges, successes, lessons learned, and best practices faced in integrated service delivery. The integrated service delivery strategy that we refer to is intended to offer a well-coordinated set of services to help families become financially stable. Under this strategy, participants receive a coordinated set of services in at least two out of three core pillars: financial coaching and financial education services, employment services, and services to improve access to public benefits. Integrated service delivery is also sometimes referred to as a "bundled service" strategy.

As part of our evaluation, we are interviewing administrators; including program directors, staff, partners; and participants to better understand how WFSN-affiliated sites integrate services. Participation in the study is voluntary. You can choose not to answer a question and may stop the interview at any time. Your participation in this study is important, however, and will help us understand more about the landscape of integrated service provision among WFSN-affiliated sites. The interview will take approximately 60 minutes.

Your responses will be kept private and used only for research purposes. In discussions and in reporting, your responses will be combined with responses from other staff without mention of individual names. Only the study team will have access to the information you provide during the interview.

We'd like to record this interview so we can listen without trying to document everything. Do we have your permission to record?

IF NECESSARY: The recording will only be used to fill gaps in my notes; no one outside the Mathematica evaluation team will have access.

Do you have any questions before we begin?

I'd like to start with a few questions about you and the environment in which you offer integrated services. We'll discuss the characteristics of your target population as part of this discussion.

1. BACKGROUND, INCLUDING ENVIRONMENT AND POPULATION

- Could you tell us your job title and role and a brief overview of your history with [ORGANIZATION NAME]?
- What was your previous work experience both with and outside this organization that is relevant to this role?

Service environment

- Please describe the environment in which your program operates. How does the local economy, state or local policies, or the presence of other service organizations affect what you do or how you serve? (For example, due to the jobs available locally, state and local funding sources for your organization and others like it, or specific policies that affect that your clientele.)
- What types of services are in high demand in this area and for this organization?
- What are some of the primary service gaps in this area and for this organization?

Target population

- Can you describe the primary population that your organization serves using the integrated services strategy? How are individuals recruited for services? What are the eligibility criteria and how were they determined?
- How do the demographics of the target population influence how services are integrated, the desired outcomes for participants, and program structure and/or implementation?
- What strategies have been most effective with finding appropriate participants? Are there challenges with recruiting participants?

2. INTEGRATED SERVICE DELIVERY

We'd now like to focus on talking about the components of the integrated service strategy that your organization provides. We'll ask about the specific services that you and your partners provide a little later during our interview.

Integrated services

- How does your organization define integrated service delivery? Does the definition involve service provision across pillars or also specific services in the three pillars? [IF THE RESPONDENT HAS TROUBLE ANSWERING THIS QUESTION] Do participants typically receive services only in one area, or across multiple areas? If multiple areas, which areas and which services?
- Did your organization always use an integrated services strategy? If no, how is the integrated services strategy different from how [NAME OF ORGANIZATION] served participants before offering this strategy?
- How has the integrated services strategy evolved over the last five years, if at all? What were some of the key factors that caused this evolution?
- How is the integrated services strategy different from other employment and training or financial support programs in the community that may be available to participants?
- What determines whether participants receive services in more than one pillar?
- Do you integrate services to achieve economies of scale in offering services or because participants come in with targeted, specific needs (not general needs)?
- Does [ORGANIZATION NAME] use specific strategies to encourage participants to engage in services across pillars? IF YES: What strategies are used? What has been most useful?
- How much input do participants have in selecting the services they receive? What is the process for deciding the services recommended to a participant? How do you reconcile participant choice with your organization's commitment to integrating services?
- Do you sequence the services for participants? That is, do you determine the order in which a participant receives services? Why do you sequence the services (PROBE: is it to help integrate service delivery or is it to help participant flow or something else)? How do you reconcile sequencing with participant choice?
    - [IF THE SITE HAS A SET SEQUENCE] In which pillar (employment services, financial education, or access to benefits) do you offer services first? Which pillar comes second? Which pillar comes third? Do you prioritize services for delivery within each pillar?
    - [IF THE SITE HAS A SET SEQUENCE] What is the rationale behind the way in which services are sequenced? Why is [TAILOR TO WHAT SERVICE IS FIRST] viewed as most important? What happens when a participant does not want to take services in the recommended sequence?

  - [IF THE SITE DOES NOT HAVE A SET SEQUENCE] What is the rationale behind not using a set sequence for services? What services do you feel are important to receive first?

- In total, at how many different locations are integrated services provided to participants? Which services in which pillars are provided at which locations? Do you face coordination challenges (or other) difficulties in integrating services when services are offered in multiple locations?
- Are there any services in the three core pillars—financial education, employment services, or accessing benefits—that participants would benefit from but that [ORGANIZATION NAME] is not able to provide?
- What are the challenges that staff face in integrating service delivery? What are the challenges that participants have in using this strategy?
- What works well for integrating services?
- What are the lessons learned from working with participants under the integrated services strategy?

I'd now like to discuss how your organization supports integrated service delivery through data measurement, staffing, and organizational culture and partnerships.

Measurement

- How are goals set for your organization with respect to integrated service delivery? Do you set other types of organizational goals? (These types of goals are different from the goals set for individual participants because they help assess whether the organization is achieving its own goals.) How are the goals tracked (such as quantitative measures or anecdotal evidence)? Are there quality assurance processes to track organizational goals? How is this data used to improve performance?
- How do you ensure that services are being integrated as intended? Do you use data? If so, what measures do you use?
- Does your organization use the information gathered on program implementation to improve services? How do you use it? For example, do organizational leaders have meetings to review data and then make changes to services based on the review of data?

Staffing

- What staff are needed to support an integrated service delivery? How has your current staffing facilitated and challenged integrated service delivery?
- How are staff recruited and selected for positions supporting integrated service delivery? What strategies have worked best to recruit staff?
- What are the skills, education, and experience that you look for in supervisors, line staff, and direct service positions to support integrated service delivery?

- Regarding volunteers, how are volunteers integrated into your organization to ensure integrated service delivery, if at all? What do volunteers do and how do they augment services?
- What are challenges, if any, in hiring and retaining staff to implement the integrated services strategy? How are these challenges addressed? Is staff retention and turnover a problem? What are the consequences when staff leave? (For example, do participants experience a lag in services?) What efforts are being made by the organization to better retain staff?
- What is the process for training staff that deliver integrated services, including the training they receive when first join your organization (that is, when are they trained and what is the training to onboard staff) and the ongoing efforts to train and/or develop staff?
- How are training needs identified? How are they addressed? What additional training might benefit staff?
- How are staff supported (including supervision) to ensure integrated service delivery? For example, do they report to a specific manager? Do they have team meetings or one-on-one meetings with their supervisors? What is discussed during these meetings? Do they have performance reviews? How often and what is discussed during those reviews?
- What challenges have you faced in recruiting, training, developing, and supervising staff to ensure integrated service delivery?

Organizational culture

- How would you describe the environment or atmosphere at [ORGANIZATION NAME] among staff who deliver integrated services (and their managers)? (That is, what's the general feeling like here? For example, is it collegial or can it be challenging?)

Organizational partnerships

Now we'd like to focus on the partners that your organization works with to deliver services under the integrated services strategy. We'd like to discuss your relationship with your partners and the services that the partners provide.

- Do you have partners that offer services that are part of the integrated service delivery?
- IF NOT PARTNERS: Why not? Have you done so in the past?
- IF THERE ARE PARTNERS:
  - Why did your organization decide to work with partners in delivering services? [PROBES: Is it because the partners offer services that your organization does not or cannot offer?]
  - Where are partners located? [IF CO-LOCATED] What factors determine colocation? Does it depend on the type of organization or some other factor? What opportunities and challenges arise with colocation?
  - Who are the key partners that offer services and what are their primary roles and responsibilities? (What services, resources, and supports do they provide?) What formal or informal agreements are in place?

- What additional partners might be useful to strengthen the integrated services strategy?
- What type of training/development is provided specifically on the integrated services strategy to staff at partner organizations?
- How are referrals to partners facilitated? Do you use techniques like a “warm handoff” to refer participants to staff located at your partners?
- What challenges have you or your organization experienced while working with partners to provide seamless, integrated service delivery? What successes or strengths have you experienced?

3. CORE PROGRAM COMPONENTS

Now I'd like to discuss the specific services that your organization provides under the integrated service strategy. We'll discuss the services themselves, as well as retaining participants in services.

Core services

- When a new participant comes to your organization for services, is he or she assessed for the services that would be appropriate for that participant? How is assessment conducted? (Do you use a specific tool for assessment?) Who conducts the assessment? Is it one-on-one, in-person, electronic, or conducted in another mode?
- Are any services considered to be required or mandatory for participants? Which ones, and why are they required? Are any services considered to be voluntary? Why are these services considered voluntary?
- To what extent are services individualized based on the participant's needs, abilities, and interests?
- How are services delivered (for example, one-on-one, in a classroom, online) to facilitate integrated service delivery? What is the length of time between services? How long does each service last?
- What is the intensity of the services provided? (How frequently do participants receive the service and over what time period?) Is it the same level of intensity for all participants or does it vary? If it varies, how (and does it vary by pillar)?

Retention and progress

- Do participants set goals for particular outcomes they would like to achieve? (For example, getting and keeping a job, getting a raise or promotion, paying off credit card debt, raising their credit score.) How do they set goals? Do they meet with staff to set goals? What are typical goals that participants set?
- How do participants progress through the service delivery process? (Does a staff person determine when a participant progresses to a new activity? How do staff do this?)
- How is program participation and progress encouraged? What strategies are used to engage participants? What has been most useful?
- What are the major challenges with participant retention? What are the underlying causes (that is, what causes retention problems, or why is there a lack of interest in services)? [POSSIBLE PROBES: Do participants feel that services are not relevant to them? Do they face challenges or crises that inhibit them from participating in services? Do participants drop out or disengage due to the sequenced or bundled nature of services?]

4. OUTCOMES

Now I'd like to discuss how your organization uses data to track and assess participants and services, and how your organization monitors data collection and data quality.

- Does your organization use data to drive decision-making? (For example, does your organization review client data to determine whether you should change the services that you offer or the sequence in which services are offered.) If yes, how is data used?
- Who is responsible for monitoring data collection and data quality? How do they monitor data collection and data quality?
- What challenges has your organization experienced in collecting and monitoring participant service receipt and outcome data? What factors facilitate data collection and monitoring?

5. WRAP-UP

- Is there anything you'd like to add? Do you have any questions for us?

Thank you for your time and willingness to discuss integrated services with us today.

APPENDIX B-2

WFSN SITE VISIT INTERVIEW GUIDE:

MAIN ORGANIZATION DIRECT SERVICE STAFF

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Introduction (read by interviewer):

As you may know, Mathematica Policy Research is conducting the Working Families Success Network (WFSN) evaluation on behalf of its funding partners. This study will document how a sample of sites implement an integrated service delivery under the WFSN umbrella as well as challenges, successes, lessons learned, and best practices faced in integrated service delivery. The integrated service delivery strategy that we refer to is intended to offer a well-coordinated set of services to help families become financially stable. Under this strategy, participants receive a coordinated set of services in at least two out of three core pillars: financial coaching and financial education services, employment services, and services to improve access to public benefits. Integrated service delivery is also sometimes referred to as a "bundled service" strategy.

As part of our evaluation, we are interviewing administrators; including program directors, staff, partners; and participants to better understand how WFSN-affiliated sites integrate services. Participation in the study is voluntary. You can choose not to answer a question and may stop the interview at any time. Your participation in this study is important, however, and will help us understand more about the landscape of integrated service provision among WFSN-affiliated sites. The interview will take approximately 60 minutes.

Your responses will be kept private and used only for research purposes. In discussions and in reporting, your responses will be combined with responses from other staff without mention of individual names. Only the study team will have access to the information you provide during the interview.

We'd like to record this interview so we can listen without trying to document everything. Do we have your permission to record?

IF NECESSARY: The recording will only be used to fill gaps in my notes; no one outside the Mathematica evaluation team will have access.

Do you have any questions before we begin?

I'd like to start with a few questions about you and the environment in which you offer integrated services. We'll discuss the characteristics of your target population as part of this discussion.

1. BACKGROUND, INCLUDING ENVIRONMENT AND POPULATION

- Could you tell us your job title and role and a brief overview of your history with [ORGANIZATION NAME]?
- What was your previous work experience both with and outside this organization that is relevant to this role?

Service environment

- Please describe the environment in which your program operates. How does the local economy, state or local policies, or the presence of other service organizations affect what you do or how you serve? (For example, due to the jobs available locally, state and local funding sources for your organization and others like it, or specific policies that affect that your clientele.)
- What types of services are in high demand in this area and for this organization?
- What are some of the primary service gaps in this area and for this organization?

Target population

- Can you describe the primary population that your organizations serves using the integrated services strategy? How are individuals recruited for services? What are the eligibility criteria and how were they determined?
- How do the demographics of the target population influence how services are integrated, the desired outcomes for participants, and program structure and/or implementation?
- What strategies have been most effective with finding appropriate participants? Are there challenges with recruiting participants?

2. INTEGRATED SERVICE DELIVERY

We'd now like to focus on talking about the components of the integrated service strategy that your organization provides. We'll ask about the specific services that you and your partners provide a little later during our interview.

Integrated services

- How does your organization define integrated service delivery? Does the definition involve service provision across pillars or also specific services in the three pillars? [IF THE RESPONDENT HAS TROUBLE ANSWERING THIS QUESTION] Do participants typically receive services only in one area, or across multiple areas? If multiple areas, which areas and which services?
- How is the integrated services strategy different from other employment and training or financial support programs in the community that may be available to participants?
- What determines whether participants receive services in more than one pillar?
- Does [ORGANIZATION NAME] use specific strategies to encourage participants to engage in services across pillars? IF YES: What strategies are used? What has been most useful?
- How much input do participants have in selecting the services they receive? What is the process for deciding the services recommended to a participant? How do you reconcile participant choice with the need to integrate services?
- Do you sequence the services for participants? That is, do you determine the order in which a participant receives services? Why do you sequence the services (PROBE: is it to help integrate service delivery or is it to help participant flow or something else)? How do you reconcile sequencing with participant choice?
    - [IF THE SITE HAS A SET SEQUENCE] In which pillar (employment services, financial education, or access to benefits) do you offer services first? Which pillar comes second? Which pillar comes third? Do you prioritize services for delivery within each pillar? What happens when a participant does not want to take services in the recommended sequence?
    - [IF THE SITE DOES NOT HAVE A SET SEQUENCE] What services do you feel are important to receive first?
- In total, at how many different locations are integrated services provided to participants? Which services in which pillars are provided at which locations? Do you face coordination challenges (or other) difficulties in integrating services when services are offered in multiple locations?
- Are there any services in the three core pillars—financial education, employment services, or accessing benefits—that participants would benefit from but that [ORGANIZATION NAME] is not able to provide?
- What are the challenges that you face in integrating service delivery? What are the challenges that participants have in using this strategy?

- What works well for integrating services?
- What are the lessons learned from working with participants under the integrated services strategy?

Staffing

- What are your responsibilities in delivering services to participants? (Do you teach classes or training, provide case management or coaching, conduct assessments, etc.?)
- What training did you undergo (including, when are you trained and what types of training) before delivering services to participants? What did you learn specifically about the WFSN strategy?
- Do you have ongoing training?
- What additional training might benefit you?
- What supervisory support is provided to you? (Do you meet with a supervisor regularly, one-on-one, in group meetings, etc.? What is discussed during those meetings?)
- What other supports are available to you? What other supports would benefit you?

Organizational culture

- How would you describe the environment or atmosphere at [ORGANIZATION NAME] among staff who deliver integrated services (and their managers)? (That is, what's the general feeling like here? For example, is it collegial or can it be challenging?)

Organizational partnerships

Now we'd like to focus on the partners that your organization works with to deliver services under the integrated services strategy. We'd like to discuss your relationship with your partners and the services that the partners provide.

- Do you have partners that offer services that are part of the integrated service delivery?
- IF THERE ARE PARTNERS:
  - What staff do you work with at those partnering organizations?
  - Who are the key partners that offer services and what are their primary roles and responsibilities? (What services, resources, and supports do they provide?)
  - How are referrals to partners facilitated? Do you use techniques like a "warm handoff" to refer participants to staff located at your partners?
  - What additional partners might be useful to strengthen the integrated services strategy?
  - What challenges have you or your organization experienced while working with partners to provide seamless, integrated service delivery? What successes or strengths have you experienced?

3. CORE PROGRAM COMPONENTS

Now I'd like to discuss the specific services that your organization provides under the integrated service strategy. We'll discuss the services themselves, as well as retaining participants in services.

Core services

- When a new participant comes to your organization for services, is he or she assessed for the services that would be appropriate for that participant? How is assessment conducted? (Do you use a specific tool for assessment?) Do you conduct the assessment? Is it one-on-one, in-person, electronic, or conducted in another mode?
- Are any services considered to be required or mandatory for participants? Which ones, and why are they required? Are any services considered to be voluntary? Why are these services considered voluntary?
- To what extent are services individualized based on the participant's needs, abilities, and interests?
- How are services delivered (for example, one-on-one, in a classroom, online) to facilitate integrated service delivery? What is the length of time between services? How long does each service last?
- What is the intensity of the services provided? (How frequently do participants receive the service and over what time period?) Is it the same level of intensity for all participants or does it vary? If it varies, how (and does it vary by pillar)?

Retention and progress

- Do participants set goals for particular outcomes they would like to achieve? (For example, getting and keeping a job, getting a raise or promotion, paying off credit card debt, raising their credit score.) How do they set goals? Do they meet with you to set goals? What are typical goals that participants set?
- How do participants progress through the service delivery process? (Do you or another staff person determine when a participant progresses to a new activity? How do staff do this?)
- How is program participation and progress encouraged? What strategies are used to engage participants? What has been most useful?
- What are the major challenges with participant retention? What are the underlying causes (that is, what causes retention problems, or why is there a lack of interest in services)? [POSSIBLE PROBES: Do participants feel that services are not relevant to them? Do they face challenges or crises that inhibit them from participating in services? Do participants drop out or disengage due to the sequenced or bundled nature of services?]

4. OUTCOMES

Now I'd like to discuss how your organization uses data to track and assess participants and services, and how your organization monitors data collection and data quality.

- Does your organization or do you use data to drive decision-making? (For example, do you review client data to determine whether you should change the services that you offer or the sequence in which services are offered?) If yes, how is data used?
- Who is responsible for monitoring data collection and data quality? How do they monitor data collection and data quality?
- What challenges has your organization experienced in collecting and monitoring participant service receipt and outcome data? What factors facilitate data collection and monitoring?

5. WRAP-UP

- Is there anything you'd like to add? Do you have any questions for us?

Thank you for your time and willingness to discuss integrated services with us today.

APPENDIX B-3

WFSN SITE VISIT INTERVIEW GUIDE:

PARTNER ORGANIZATION MANAGERS

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Introduction (read by interviewer):

As you may know, Mathematica Policy Research is conducting the Working Families Success Network (WFSN) evaluation on behalf of its funding partners. This study will document how a sample of sites implement an integrated service delivery under the WFSN umbrella as well as challenges, successes, lessons learned, and best practices faced in integrated service delivery. The integrated service delivery strategy that we refer to is intended to offer a well-coordinated set of services to help families become financially stable. Under this strategy, participants receive a coordinated set of services in at least two out of three core pillars: financial coaching and financial education services, employment services, and services to improve access to public benefits. Integrated service delivery is also sometimes referred to as a "bundled service" strategy.

As part of our evaluation, we are interviewing administrators; including program directors, staff, partners; and participants to better understand how WFSN-affiliated sites integrate services. Participation in the study is voluntary. You can choose not to answer a question and may stop the interview at any time. Your participation in this study is important, however, and will help us understand more about the landscape of integrated service provision among WFSN-affiliated sites. The interview will take approximately 60 minutes.

Your responses will be kept private and used only for research purposes. In discussions and in reporting, your responses will be combined with responses from other staff without mention of individual names. Only the study team will have access to the information you provide during the interview.

We'd like to record this interview so we can listen without trying to document everything. Do we have your permission to record?

IF NECESSARY: The recording will only be used to fill gaps in my notes; no one outside the Mathematica evaluation team will have access.

Do you have any questions before we begin?

1. BACKGROUND, INCLUDING ENVIRONMENT AND POPULATION

- Could you tell us your job title and role and a brief overview of your history with [PARTNER ORGANIZATION NAME]?
- What was your previous work experience both with and outside this organization that is relevant to this role?

Service environment

- Please describe the environment in which your program operates. How does the local economy, state or local policies, or the presence of other service organizations affect what you do or how you serve? (For example, due to the jobs available locally, state and local funding sources for your organization and others like it, or specific policies that affect that your clientele.)
- What types of services are in high demand in this area and for this organization?
- What are some of the primary service gaps in this area and for this organization?

Target population

- Can you describe the primary population that your organization serves using the integrated services strategy? How are individuals referred to your organization for services? What are the eligibility criteria and how were they determined?

2. INTEGRATED SERVICE DELIVERY

We'd now like to focus on talking about the components of the integrated service strategy that your organization provides. We'll ask about the specific services that you and your partners provide a little later during our interview.

Integrated services

- What is your organization's role in delivering the WFSN strategy? (What services, resources, and supports does your organization provide?)
- How are referrals facilitated from [MAIN IMPLEMENTING ORGANIZATION'S NAME]? Do you use techniques like a "warm handoff" to receive participants?
- In total, at how many different locations are integrated services provided to participants? Which services in which pillars are provided at which locations? Do you face coordination challenges (or other) difficulties in integrating services when services are offered in multiple locations?
- Are there any services in the three core pillars—financial education, employment services, or accessing benefits—that participants would benefit from but that [PARTNER ORGANIZATION NAME] is not able to provide?
- How is the integrated services strategy different from other employment and training or financial support programs in the community that may be available to participants?

Staffing

- What staff are needed to support an integrated service delivery? How has your current staffing facilitated and challenged integrated service delivery?
- How are staff recruited and selected for positions supporting integrated service delivery? What strategies have worked best to recruit staff?
- What are the skills, education, and experience that you look for in supervisors, line staff, and direct service positions to support integrated service delivery?
- Regarding volunteers, how are volunteers integrated into your organization to ensure integrated service delivery, if at all? What do volunteers do and how do they augment services?
- What are challenges, if any, in hiring and retaining staff to implement the integrated services strategy? How are these challenges addressed? Is staff retention and turnover a problem? What are the consequences when staff leave? (For example, do participants experience a lag in services?) What efforts are being made by the organization to better retain staff?
- What is the process for training staff that deliver integrated services, including the training they receive when first join your organization (that is, when are they trained and what is the training to onboard staff) and the ongoing efforts to train and/or develop staff?
- How are training needs identified? How are they addressed? What additional training might benefit staff?

- How are staff supported (including supervision) to ensure integrated service delivery? For example, do they report to a specific manager? Do they have team meetings or one-on-one meetings with their supervisors? What is discussed during these meetings? Do they have performance reviews? How often and what is discussed during those reviews?
- What challenges have you faced in recruiting, training, developing, and supervising staff to ensure integrated service delivery?

Organizational partnerships

- What formal or informal agreements are in place with [MAIN ORGANIZATION]? What strategies or processes are used to manage the partnership?
- [IF CO-LOCATED] What factors determine colocation? Does it depend on the type of organization, the integrated services being offered, or some other factor?
- What challenges have you or your organization experienced while working with [MAIN ORGANIZATION] to provide seamless, integrated service delivery? What successes or strengths have you experienced?

3. CORE PROGRAM COMPONENTS

Now I'd like to discuss the specific services that your organization provides under the integrated service strategy. We'll discuss the services themselves, as well as retaining participants in services.

Core services

- What financial coaching and financial education services does your organization provide?
- What employment services does your organization provide?
- Does your organization help participants access to public benefits? If yes, which benefits?
- To what extent are services individualized based on the participant's needs, abilities, and interests?
- How are services delivered (for example, one-on-one, in a classroom, online) to facilitate integrated service delivery? What is the length of time between services? How long does each service last?
- What is the intensity of the services provided? (How frequently do participants receive the service and over what time period?) Is it the same level of intensity for all participants or does it vary? If it varies, how (and does it vary by pillar)?

Retention and progress

- How is program participation and progress encouraged? What strategies are used to engage participants? What has been most useful?
- What are the major challenges with participant retention? What are the underlying causes (that is, what causes retention problems, or why is there a lack of interest in services)? [POSSIBLE PROBES: Do participants feel that services are not relevant to them? Do they face challenges or crises that inhibit them from participating in services? Do participants drop out or disengage due to the sequenced or bundled nature of services?]

4. OUTCOMES

Now I'd like to discuss how your organization uses data to track and assess participants and integrated services, and how your organization monitors data collection and data quality.

Does your organization use data to drive decision-making? (For example, do you review client data to determine whether you should change the services that you offer or the sequence in which services are offered?) If yes, how is data used?

Who is responsible for monitoring data collection and data quality? How do they monitor data collection and data quality?

Does your organization share data on integrated services with [MAIN ORGANIZATION]? How is data shared and how often? Who is responsible for sharing it?

What challenges has your organization experienced in collecting and monitoring participant service receipt and outcome data? What factors facilitate data collection and monitoring?

5. WRAP-UP

- Is there anything you'd like to add? Do you have any questions for us?

Thank you for your time and willingness to discuss integrated services with us today.

APPENDIX B-4

WFSN SITE VISIT INTERVIEW GUIDE:

PARTNER ORGANIZATION DIRECT SERVICE STAFF

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Introduction (read by interviewer):

As you may know, Mathematica Policy Research is conducting the Working Families Success Network (WFSN) evaluation on behalf of its funding partners. This study will document how a sample of sites implement an integrated service delivery under the WFSN umbrella as well as challenges, successes, lessons learned, and best practices faced in integrated service delivery. The integrated service delivery strategy that we refer to is intended to offer a well-coordinated set of services to help families become financially stable. Under this strategy, participants receive a coordinated set of services in at least two out of three core pillars: financial coaching and financial education services, employment services, and services to improve access to public benefits. Integrated service delivery is also sometimes referred to as a "bundled service" strategy.

As part of our evaluation, we are interviewing administrators; including program directors, staff, partners; and participants to better understand how WFSN-affiliated sites integrate services. Participation in the study is voluntary. You can choose not to answer a question and may stop the interview at any time. Your participation in this study is important, however, and will help us understand more about the landscape of integrated service provision among WFSN-affiliated sites. The interview will take approximately 60 minutes.

Your responses will be kept private and used only for research purposes. In discussions and in reporting, your responses will be combined with responses from other staff without mention of individual names. Only the study team will have access to the information you provide during the interview.

We'd like to record this interview so we can listen without trying to document everything. Do we have your permission to record?

IF NECESSARY: The recording will only be used to fill gaps in my notes; no one outside the Mathematica evaluation team will have access.

Do you have any questions before we begin?

1. BACKGROUND, INCLUDING ENVIRONMENT AND POPULATION

- Could you tell us your job title and role and a brief overview of your history with [ORGANIZATION NAME]?
- What was your previous work experience both with and outside this organization that is relevant to this role?

Service environment

- Please describe the environment in which your program operates. How does the local economy, state or local policies, or the presence of other service organizations affect what you do or how you serve? (For example, due to the jobs available locally, state and local funding sources for your organization and others like it, or specific policies that affect that your clientele.)
- What types of services are in high demand in this area and for this organization?
- What are some of the primary service gaps in this area and for this organization?

Target population

- Can you describe the primary population that your organization serves using the integrated services strategy? How are individuals referred to your organization for services? What are the eligibility criteria and how were they determined?

2. INTEGRATED SERVICE DELIVERY

We'd now like to focus on talking about the components of the integrated service strategy that your organization provides. We'll ask about the specific services that you and your partners provide a little later during our interview.

Integrated services

- What is your organization's role in delivering the WFSN strategy? (What services, resources, and supports does your organization provide?) What services do you provide?
- How are referrals facilitated from [MAIN IMPLEMENTING ORGANIZATION'S NAME]? Do you use techniques like a "warm handoff" to receive participants?
- In total, at how many different locations are integrated services provided to participants? Which services in which pillars are provided at which locations? Do you face coordination challenges (or other) difficulties in integrating services when services are offered in multiple locations?
- Are there any services in the three core pillars—financial education, employment services, or accessing benefits—that participants would benefit from but that [PARTNER ORGANIZATION NAME] is not able to provide?

Organizational Partnerships and Staffing

- Do you work with or communicate with staff at [MAIN ORGANIZATION] to coordinate and deliver integrated services to participants? What staff do you work with at that organization?
- What are your responsibilities in delivering services to participants? (Do you teach classes or training, provide case management or coaching, conduct assessments, etc.?)
- What training did you undergo (including, when are you trained and what types of training) before delivering integrated services to participants? What did you learn specifically about the integrated service delivery strategy?
- Do you have ongoing training?
- What additional training might benefit you?
- What supervisory support is provided to you? (Do you meet with a supervisor regularly, one-on-one, in group meetings, etc.? What is discussed during those meetings?)
- What other supports are available to you? What other supports would benefit you?

3. CORE PROGRAM COMPONENTS

Now I'd like to discuss the specific services that your organization provides under the integrated service strategy. We'll discuss the services themselves, as well as retaining participants in services.

Core services

- How are services delivered (for example, one-on-one, in a classroom, online) to facilitate integrated service delivery? What is the length of time between services? How long does each service last?
- What is the intensity of the services provided? (How frequently do participants receive the service and over what time period?) Is it the same level of intensity for all participants or does it vary? If it varies, how (and does it vary by pillar)?

Retention and progress

- How is program participation and progress encouraged? What strategies are used to engage participants? What has been most useful?
- What are the major challenges with participant retention? What are the underlying causes (that is, what causes retention problems, or why is there a lack of interest in services)? [POSSIBLE PROBES: Do participants feel that services are not relevant to them? Do they face challenges or crises that inhibit them from participating in services? Do participants drop out or disengage due to the sequenced or bundled nature of services?]

4. OUTCOMES

- Now I'd like to discuss how your organization uses data to track and assess participants and services, and how your organization monitors data collection and data quality.
- Does your organization or do you use data to drive decision-making? (For example, do you review client data to determine whether you should change the services that you offer or the sequence in which services are offered?) If yes, how is data used?
- Who is responsible for monitoring data collection and data quality? How do they monitor data collection and data quality?
- What challenges has your organization experienced in collecting and monitoring participant service receipt and outcome data? What factors facilitate data collection and monitoring?

5. WRAP-UP

- Is there anything you'd like to add? Do you have any questions for us?

Thank you for your time and willingness to discuss integrated services with us today.

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APPENDIX B-5

WFSN SITE VISIT: PROGRAM PARTICIPANT INTERVIEW GUIDE

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Introduction (read by the focus group facilitator):

Thank you for joining us today. I am from an organization called Mathematica Policy Research. We are conducting the Working Families Success Network evaluation on behalf of United Way Worldwide and its funding partners. This study will document how programs like the one at [ORGANIZATION NAME] provide services.

As part of our evaluation, we are talking with participants to better understand how these services help them and what could be improved. We would like to hear about the types of services you received and your overall experience with these services. You can choose not to answer a question and may stop or leave the discussion at any time. This discussion will take approximately 75 minutes. Your participation in this study is important and will help us understand more about the services provided to participants in other organizations like [ORGANIZATION NAME].

Anything you say today will be kept confidential. This means that we will keep everything you say here today private and the information will be shared only with our study team. Nothing you say will be linked to your name and our reports will not identify you in any way. Information you provide will not be shared with any organization staff, nor affect the services you receive. We also ask that you respect each other's privacy and confidentiality by not discussing anything that we talk about today outside of this meeting.

Participation in the study is voluntary. At the end of the discussion, you will be given a $25 gift card as a token of appreciation for your time.

With your permission, to make sure I hear everything you have to say, I would like to record the discussion. The recording is for research purposes only, will only be available to the study team, and will be destroyed at the end of the study. Do I have your permission? Please raise your hand if I do not. *[Facilitator: do not record conversation if there is any objection.]*

Does anyone have any questions before we begin?

BACKGROUND

- Could you each tell me your first name and how long you have been receiving services from [ORGANIZATION NAME]?

PROGRAM DESIGN AND ORGANIZATIONAL INTEGRATION

Individual's purpose and goals

- What do you expect to be different in your life 6 months from now as a result of the services that you receive from [ORGANIZATION NAME]? What do you hope will be different a year from now?

PROGRAM STAFFING

Organizational climate

- How would you describe the environment or atmosphere here at [ORGANIZATION NAME]? What's the general feeling like here? For example, is it friendly and inviting or is it unwelcoming? Is it easy or hard to get the services you want? Do they treat you with respect? Do you think they really want you to succeed?
- When you receive services from this organization, which staff do you interact with? Do you have a case manager or a specific point of contact or do you interact with several different staff to receive services? Do you know who to go to if you're interested in receiving services?

RECRUITMENT AND SERVICES

Target population and recruitment

- How did you learn about this organization?
- How did you come to enroll in services? Did staff talk to you about the services you might need when you first started here? What was that process like?
- What happened during your enrollment process? Did you answer questions for an assessment or interview of some kind? IF YES:
    - What kinds of questions were included in the interview/assessment?
    - Do you know how that information was used? (For instance, was it used to help identify services you would receive and/or to help you set goals?)
- [FOR PARTICIPANTS WHO SAID THEY DIDN'T HAVE AN ASSESSMENT OR ASSESSMENT WAS NOT USED TO DETERMINE SERVICES THEY WOULD RECEIVE]: How did you and program staff decide which activities you would participate in?
- Did you set goals? If so, how often did you revisit those goals with a staff member to see how close you were to achieving them?

Core program components

- How many of you have received financial coaching or financial education services? [ASK EVERYONE TO RAISE THEIR HAND IF YES AND RECORD COUNT.] What types of these services have you received? PROBE ON:

  - Figuring out or raising your credit scores
  - Buying a home or car
  - Helping to get bank accounts or credit cards
  - Help with paying down debt
- How many of you have received employment services – for example, help with getting education or finding a job? [ASK EVERYONE TO RAISE THEIR HAND IF YES AND RECORD COUNT.] What types of these services have you received? PROBE ON:
  - Education/English as a second language/GED preparation
  - College or certification programs
  - Computer/occupational/vocational training
  - Making changes to your workplace
  - Job search services
  - Job readiness training
  - Job retention services (helping you maintain your jobs or get promoted)
- How many of you have received help with other kinds of supports and benefits? [ASK EVERYONE TO RAISE THEIR HAND IF YES AND RECORD COUNT.] What did you receive help with? PROBE ON:
  - Child care
  - Equipment or supplies that you need for work
  - Health care
  - Benefits other than health care
  - Help filling out your taxes
- Has anyone received any other services? Could you please explain what these were?
- Please think of each of the three areas that we just talked about: financial education, employment service, and access to benefits. How many of you received services in all three areas? [ASK PEOPLE TO RAISE THEIR HANDS AND RECORD COUNT.] Two areas? [ASK PEOPLE TO RAISE THEIR HANDS AND RECORD COUNT.]
- Did you have to travel to different locations when you received services from (ORGANIZATION NAME)?
- How did you decide to participate in the services that you participated in?
- Did [ORGANIZATION NAME] require you to participate in any services? Which ones? Were any services optional (where you had a choice)? Which ones? Do you know why some services were required and some were optional?
- How often do you participate in services (for example, daily, weekly, monthly)? For how many hours?

- Have you received services from other organization in the area of financial education, employment services, or help you access benefits? Do you feel that the services you receive from [ORGANIZATION NAME] are different or similar to these other services? (What aspects are different? What aspects are similar?)

Participation and progress

- What services or activities that you received from [ORGANIZATION NAME] have helped you most? What has been least helpful?
- Do you want or need any additional services that you have not received? What are they?
- Does [ORGANIZATION NAME] meet your needs? If so, how? If not, why not?
- How has [ORGANIZATION NAME] encouraged you to continue and to make progress toward your goals?
- How has [ORGANIZATION NAME] encouraged you to take part in different kinds of services?

Coordination and linkages with other services within the community

- How many different locations have you been to for services? Do you know if these locations were all locations for [ORGANIZATION NAME] or for other organizations? Where were they? Were they convenient to get to? Did you have a similar experience in each location or were there differences?
- How were you connected to those services, resources, or supports? Did staff from [ORGANIZATION NAME] introduce you to staff these other organizations?
- Have these services been helpful? Would you like other types of services, resources, or supports from outside of [ORGANIZATION NAME]?

WRAP-UP

- What is the best thing about receiving services from [ORGANIZATION NAME]?
- What has been hardest for you about participating in services at [ORGANIZATION NAME]?
- What recommendations do you have to improve their services offered in the future?
- Do you have any questions for us?

APPENDIX C-1

WFSN SITE VISITS: DATA USE QUESTIONNAIRE FOR STAFF

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DATA USE: WORKING FAMILIES SUCCESS NETWORK EVALUATION

INTRODUCTION

Thank you for participating in the Working Families Success Network (WFSN) evaluation. We invite you to complete this brief survey about how your organization uses data. By completing this survey, you will help us better understand what types of information organizations like yours collect, review, and use to help support your organization and its implementation of an integrated service delivery strategy.

There are no wrong answers to these questions and this survey is in no way an assessment of your job performance, functioning, or role. Indeed, your identity will be kept confidential and will not be shared with anyone beyond the research team and your name will not be on the survey. The information you provide will be combined with information from other individuals to help provide a general portrait of how information is being used to make decisions about your organization's implementation of an integrated service delivery strategy. You may refuse to answer specific questions or discontinue your participation at any time.

The survey asks questions about: (1) the types of information or data that your organization collects on your program participants; (2) how your organization uses data; (3) resources available for data collection and analysis; (4) your views on data collection and use; (5) who leads and who participates in using data to make decisions; and (6) your additional comments as well as some information about you. The survey should take no more than 10 minutes to complete.

As you read through the survey, answer each question with the response that best fits your experience or opinion. For most questions this means selecting the circle associated with your answer; for a small number of other questions it means filling in a blank.

Please do your best to complete the survey in one sitting, though it is alright if you need to take a break. Answer the questions to the best of your abilities with the knowledge that you have about your organization. Do not compare your answers to the answers of coworkers or other people in the organization.

If you have any questions or concerns about this survey, feel free to contact Mary Anne Anderson at maanderson@mathematica-mpr.com or Margaret Sullivan, the project director, at msullivan@mathematica-mpr.com.

Thank you for your participation!

Before you begin, please record the date and time that you began the survey:

Date: |__|__| / |__|__| / |__|__|__|__|

Time: |__|__| : |__|__| AM / PM (circle)

GENERAL INSTRUCTIONS

PLEASE MARK ALL ANSWERS WITHIN THE CIRCLES PROVIDED

PLEASE READ EACH QUESTION CAREFULLY. There are different ways to answer the questions in this survey. It is important that you follow the instructions when answering each kind of question. Here are some examples.

MARK (✓) ONE FOR EACH QUESTION

If you rarely, if ever, book hotel reservations, you would check the last circle: very rarely.

a. Please rate how often you do each of the following activities:	VERY OFTEN	OFTEN	NEITHER OFTEN NOR RARELY	RARELY	VERY RARELY
1. Before leaving on a trip, you or your family book hotel reservations	○	○	○	○	○

MARK (✓) ONE FOR EACH QUESTION

If you strongly agree, you would check the first circle as shown.

b. Please rate how much you agree or disagree with the following statements:	STRONGLY AGREE	AGREE	NEITHER AGREE NOR DISAGREE	DISAGREE	STRONGLY DISAGREE
1. I love ice cream	○	○	○	○	○

A: The first set of questions asks about the data your organization <u>COLLECTS</u> on your program participants who are receiving integrated services. Please mark the circle that describes how often your organization collects data.

MARK (✓) ONE FOR EACH QUESTION

	VERY OFTEN	OFTEN	NEITHER OFTEN NOR RARELY	RARELY	VERY RARELY	DON'T KNOW
1. <u>Prior</u> to a participant receiving services at this organization, we COLLECT data on his/her . . .						
a. Employment services: Knowledge, skills, and abilities relevant to employment services (for example, education/work history)	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
b. Improved access to public benefits services: Need for supports necessary for work (for example, transportation, clothing, childcare)	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
c. Financial coaching and financial education services: Knowledge about financial education/literacy topics	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
2. <u>While</u> receiving services, we COLLECT data on a program participant's. . .						
a. Employment services received	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
b. Public benefits and other supports (for example, transportation, childcare, housing, substance abuse or mental health counseling, physical health) that each participant receives	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
c. Financial coaching and financial education services received	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
3. <u>After</u> a participant stops receiving services, we COLLECT data on his or her. . .						
a. Employment status	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
b. Public benefits received	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
c. Financial status	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
4. In our organization, we COLLECT data on. . .						
a. Measures of organizational performance	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d

B: The next set of questions asks about how your organization USES data. Please mark the circle that best describes how much you agree or disagree with each statement.

MARK (✓) ONE FOR EACH QUESTION

	STRONGLY AGREE	AGREE	NEITHER AGREE NOR DISAGREE	DISAGREE	STRONGLY DISAGREE	DON'T KNOW
In my organization we USE data to. . .						
a. Identify and develop integrated services for program participants	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
b. Identify and develop work or life stability supports that program participants might need	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
c. Help program participants improve their employment-related skills	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
d. Help program participants develop their financial literacy skills	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
e. Improve employment outcomes for program participants	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
f. Improve financial outcomes of program participants	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
g. Improve delivery of the integrated services approach	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
h. Help staff work with program participants	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
i. Provide funders with information they need	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d

C: This set of questions asks about the RESOURCES AVAILABLE for data collection and analysis in your organization. Please mark the circle that best describes how much you agree or disagree with each statement.

MARK (✓) ONE FOR EACH QUESTION

	STRONGLY AGREE	AGREE	NEITHER AGREE NOR DISAGREE	DISAGREE	STRONGLY DISAGREE	DON'T KNOW
In my organization, we. . .						
a. Have an efficient data collection and reporting system in place	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
b. Have sufficient resources to collect data	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
c. Have staff with expertise in data analysis	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
d. Translate discussions of data into actions	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
e. Focus on integrated services	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d

D: This set of questions asks about YOUR VIEWS of data collection and use. Please mark the circle that best describes how much you agree or disagree with each statement.

MARK (✓) ONE FOR EACH QUESTION

	STRONGLY AGREE	AGREE	NEITHER AGREE NOR DISAGREE	DISAGREE	STRONGLY DISAGREE	DON'T KNOW
I BELIEVE that using data. . .						
a. To make decisions is part of the culture of this organization	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
b. Can improve integrated services we provide to program participants	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
c. Takes away from the time spent helping program participants	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
d. Builds an understanding of how the integrated service approach operates	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
e. Makes me uncomfortable	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
f. Benefits the work we do with our program participants	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
g. Runs counter to my experience of how to help our target population	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d
h. Is not done well in this organization	❍ 1	❍ 2	❍ 3	❍ 4	❍ 5	❍ d

E: The next set of questions asks you about who is leading and who is participating in using data to make decisions. Please complete the line or mark the circle that best describes your answer.

1. Who in your organization is LEADING the effort to use data to make decisions about how the social enterprise operates?

   Please provide the title(s) and a brief description of his/her/their role(s) in the organization:

   1❍ _____

   _____

   _____

   0 ❍ No one

   d ❍ Don't know

2. What type of individuals in your organization uses data to make decisions?

PLEASE CHOOSE ALL THAT APPLY

1 ❍ Organizational management

2 ❍ Partner organization management/staff

3 ❍ Frontline staff (staff working directly with program participants)

4 ❍ Program administrator staff

5 ❍ Everyone in the organization

6 ❍ Other *(please specify)* _____

0 ❍ No one

d ❍ Don't know

F: The final section allows you to provide comments about using data in your organization and asks a few questions about you.

1. How can your organization improve the way it uses data to make decisions about implementation of integrated services and program participants?

_____

_____

_____

2. **Please tell us about your role in the program that uses integrated services as part of the WFSN.**

PLEASE CHOOSE ALL THAT APPLY

1 ❍ Organizational management

2 ❍ Partner organization management

3 ❍ Frontline staff (staff working directly with program participants)

4 ❍ Partner organization staff (staff at partner organizations working directly with program participants)

5 ❍ Other *(please specify)* _____

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APPENDIX C-2

WFSN SITE VISITS: PROGRAM PARTICIPANT BACKGROUND INFORMATION QUESTIONNAIRE

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MATHEMATICA
Policy Research

PARTICIPANT BACKGROUND INFORMATION QUESTIONNAIRE

Before we begin the discussion, please take a few moments to answer some questions. Your answers to these questions will help us learn more about you, so that we can better understand the comments you share with us today. We will not identify you or share your specific answers; we will only report your answers combined with the responses of the other discussion group participants. Thank you!

1. Please write your first name only:

_____

2. How long have you been receiving services from this organization?

|___|___| YEARS |___|___| MONTHS

3. What kind of services have you received?

MARK ALL THAT APPLY

1 ☐ Employment services (for example, English as a second language/GED preparation, college or certification programs, computer/occupational/vocational training, job search services, job readiness training, and job retention services)

2 ☐ Financial education or coaching (for example, figuring out or raising your credit score, buying a home or car, helping to get bank accounts or credit cards, and help with paying down debt)

3 ☐ Assistance accessing benefits (for example, child care assistance, buying equipment or supplies that you need for work, health insurance and other benefits, and help filling out your taxes)

4 ☐ Other services; please describe:

_____

4. What are the greatest barriers that you have faced in receiving services from this organization or one that it has referred you to?

MARK ALL THAT APPLY

1 ☐ Schedule of services

2 ☐ Location of services

3 ☐ Transportation to services

4 ☐ Services do not fit your needs

5 ☐ Child care commitments prevent you from taking part in services

6 ☐ Other; please describe:

_____

5. Are you currently enrolled in a training or education program?

1 ☐ Yes

0 ☐ No

6. Are you employed in a paid job?

1 ☐ Yes
0 ☐ No

7. Are you…

1 ☐ Male
2 ☐ Female
3 ☐ Prefer not to answer

8. What is the highest level of education you have completed (please check one box)?

1 ☐ Less than high school
2 ☐ High school diploma or GED
3 ☐ Some college, no degree
4 ☐ Associate's degree
5 ☐ Bachelor's degree or higher

9. What age group are you in?

1 ☐ 18-24
2 ☐ 25-34
3 ☐ 35-44
4 ☐ 45-60
5 ☐ 61+

10. Are you a parent or guardian of any children under the age of 18?

1 ☐ Yes
0 ☐ No

10a. If yes, how many children do you care for?

|___|___| CHILDREN

Thank you for taking the time to complete this survey.

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